

# **EXHIBIT 14**



US006185587B1

(12) **United States Patent**  
**Bernardo et al.**

(10) **Patent No.:** US 6,185,587 B1  
(45) **Date of Patent:** Feb. 6, 2001

(54) **SYSTEM AND METHOD FOR BUILDING A WEB SITE WITH AUTOMATED HELP**

(75) Inventors: **Richard S. Bernardo**, Needham, MA (US); **David A. Macphee**, San Mateo, CA (US); **Jennifer J. Smith**, Boston, MA (US)

(73) Assignee: **International Business Machines Corporation**, Armonk, NY (US)

(\*) Notice: Under 35 U.S.C. 154(b), the term of this patent shall be extended for 0 days.

(21) Appl. No.: 09/100,225

(22) Filed: Jun. 19, 1998

**Related U.S. Application Data**

(60) Provisional application No. 60/050,154, filed on Jun. 19, 1997, and provisional application No. 60/050,153, filed on Jun. 19, 1997.

(51) Int. Cl.<sup>7</sup> ..... G06F 17/21

(52) U.S. Cl. ..... 707/513; 345/336

(58) Field of Search ..... 707/501, 511, 707/513, 530, 102, 104; 345/336, 338

(56) **References Cited****U.S. PATENT DOCUMENTS**

5,267,155	*	11/1993	Buchanan et al.	.....	707/540
5,313,394	*	5/1994	Clapp	.....	707/531
5,911,145	*	6/1999	Arora et al.	.....	707/514
5,940,614	*	8/1999	Allen et al.	.....	717/1
5,974,443	*	10/1999	Jeske	.....	709/202
5,982,365	*	11/1999	Garcia et al.	.....	345/336
6,023,715	*	2/2000	Burkes et al.	.....	707/514

**OTHER PUBLICATIONS**

Stanek, William. Microsoft FrontPage Unleashed. Sams, Macmillan Computer Publishing. ISBN 1575211408, Pub. Date Sep. 6, 1996. ©1996. Chapters 19, 21, and 22.\*

Dion, D., Jr., et al. "Development of Educational Tools: a Web-Oriented Approach." Frontiers in Education Conference, 1997. Proceedings. (conf. held Nov. 5-8, 1997), vol. 2. IEEE, New York. ISBN 0-7803-4086-8. ©1997 pp. 842-847.\*

Maher, R. C. "Simple but Useful Tools for Interactive WWW Development." Frontiers in Education Conference, 1996. FIE '96. 26th Annual Conference, Proceedings of. (held Nov. 6-9, 1996), vol. 3. IEEE, New York. ISBN 0-7803-3348-9. ©1996. pp. 1035-1038.\*

Tyler, Denise. Laura Lemay's Web Workshop: Microsoft FrontPage. Sams, Macmillan Computer Publishing. Pub. Date Sep. 9, 1996. ISBN 1575211491. ©1996. Chapter 4.\*  
 Tyler, Denise. Laura Lemay's Web Workshop: Microsoft FrontPage 97. Sams, Macmillan Computer Publishing. Pub. Date Jan. 17, 1997. ISBN 1575212234. ©1997. Chapters 2, 3, and 5.\*

(List continued on next page.)

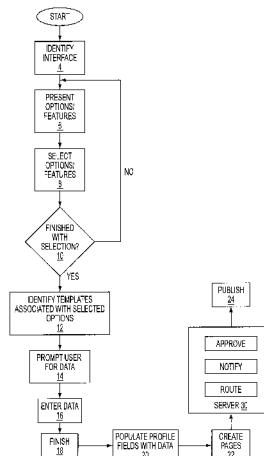
*Primary Examiner*—Joseph H. Feild

(74) *Attorney, Agent, or Firm*—Hunton & Williams

(57) **ABSTRACT**

A software tool is provided for use with a computer system for simplifying the creation of Web sites. The tool comprises a plurality of pre-stored templates, comprising HTML formatting code, text, fields and formulas. The templates preferably correspond to different types of Web pages and other features commonly found on or available to Web sites. Each feature may have various options. To create a web site, a Web site creator (the person using the tool to create a web site) is prompted by the tool through a series of views stored in the tool to select the features and options desired for the Web site. Based on these selections, the tool prompts the web site creator to supply data to populate fields of the templates determined by the tool to correspond to the selected features and options. Based on the identified templates and supplied data, the tool generates the customized Web site without the web site creator writing any HTML or other programming code. Help documents pertaining to the selected features of the web site are automatically posted to the web site.

**29 Claims, 29 Drawing Sheets**



**US 6,185,587 B1**

Page 2

---

OTHER PUBLICATIONS

Kraut, Carolyn. "Developer Tools for Building Better Web Sites," Dated Sep. 1, 1997. Iris Associates, Inc. ©1997.\*

Printouts of three message board postings from domino.lotus.com dated Mar. 5, 1997, Apr. 12, 1997, and Mar. 24, 1997.\*

\* cited by examiner

U.S. Patent

Feb. 6, 2001

Sheet 1 of 29

US 6,185,587 B1

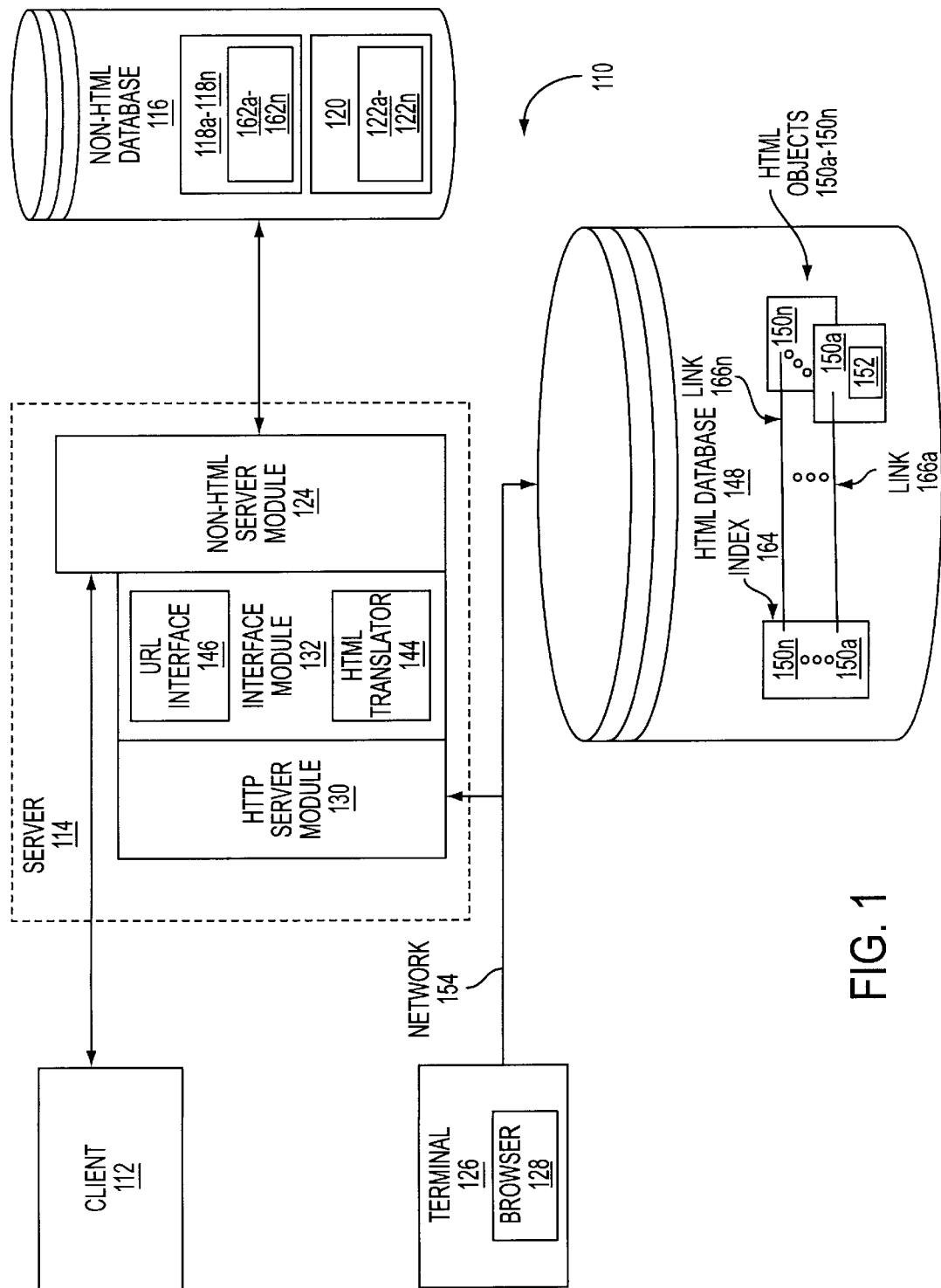


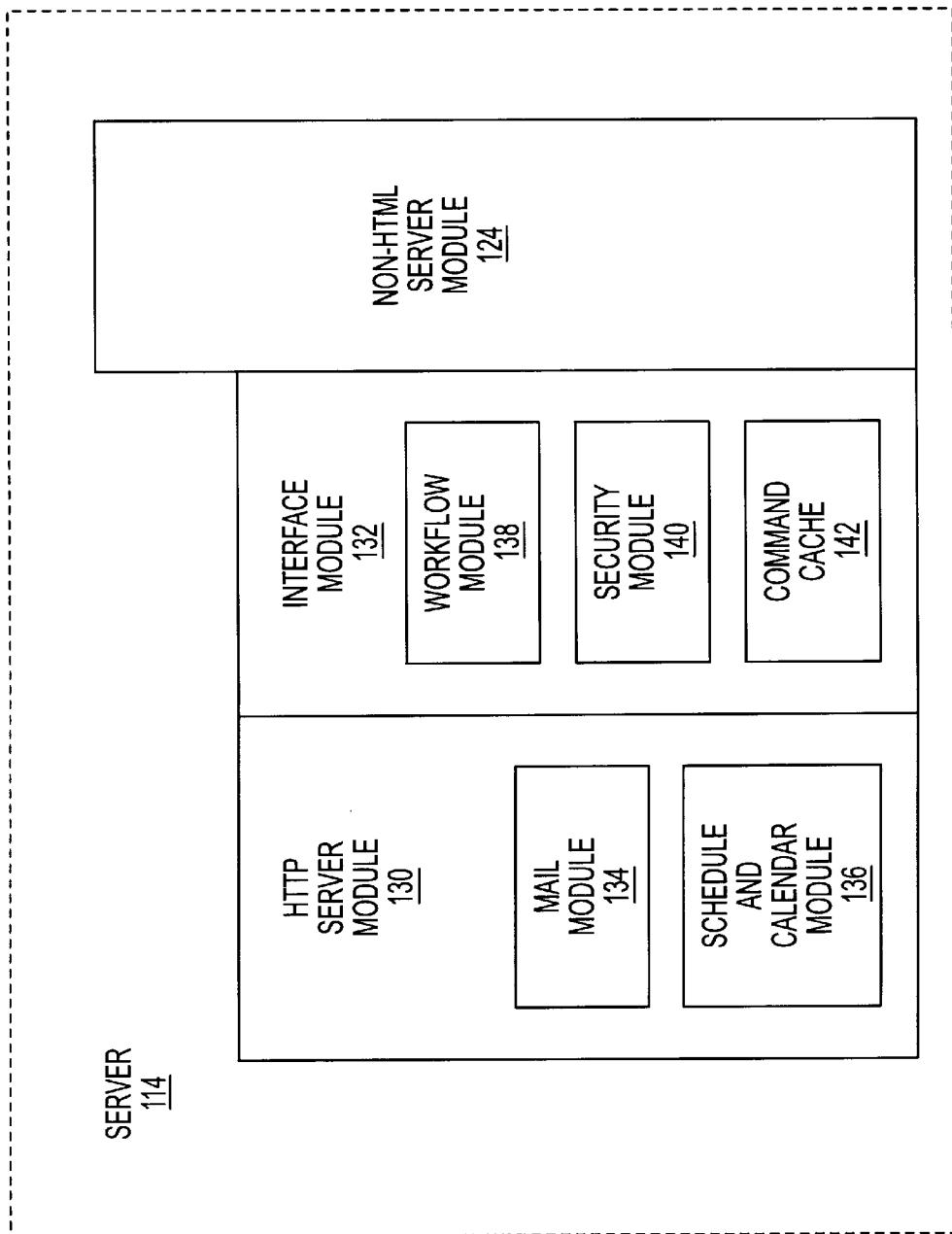
FIG. 1

**U.S. Patent**

Feb. 6, 2001

Sheet 2 of 29

**US 6,185,587 B1**



**FIG. 1A**

U.S. Patent

Feb. 6, 2001

Sheet 3 of 29

US 6,185,587 B1

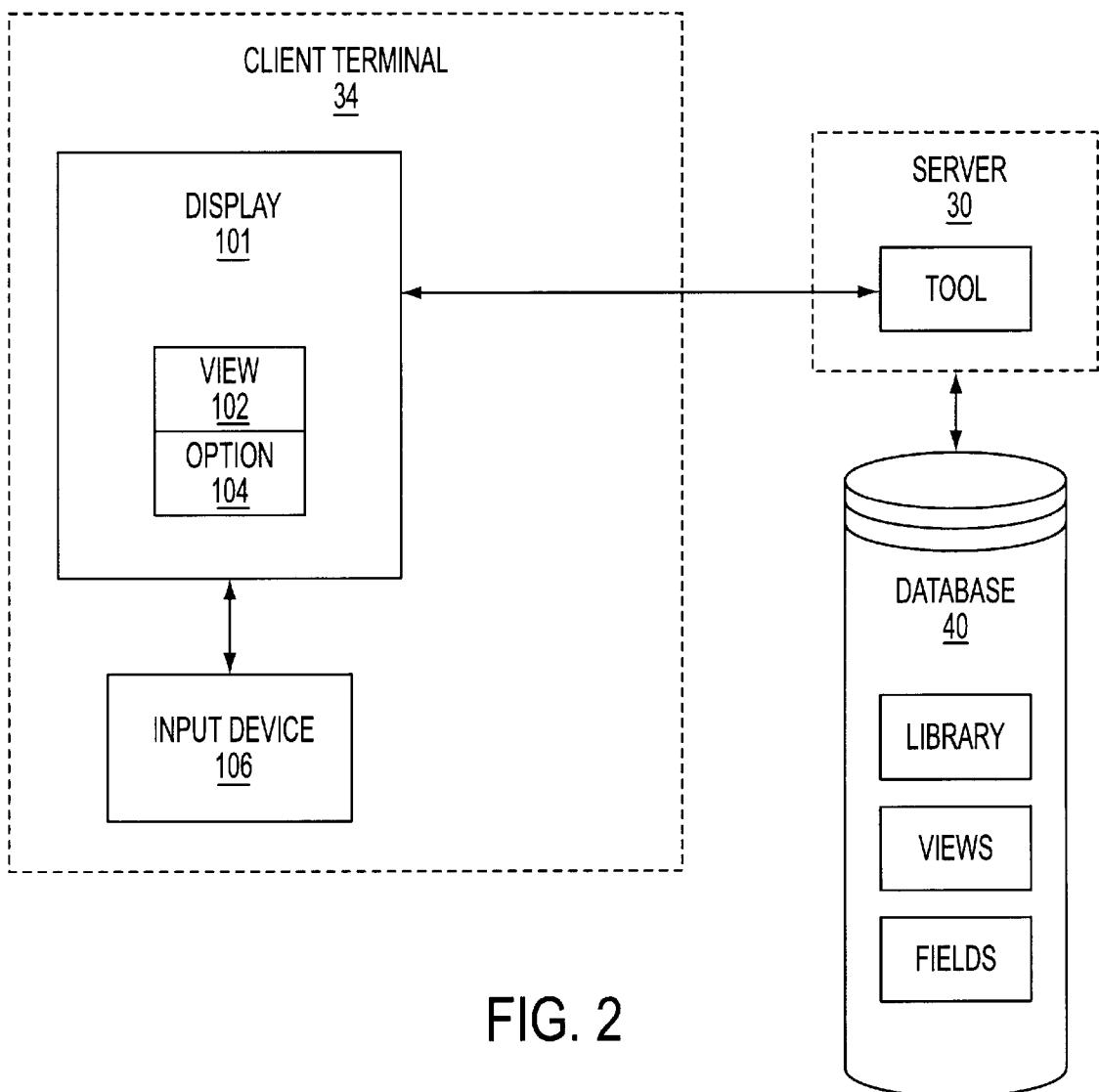


FIG. 2

U.S. Patent

Feb. 6, 2001

Sheet 4 of 29

US 6,185,587 B1

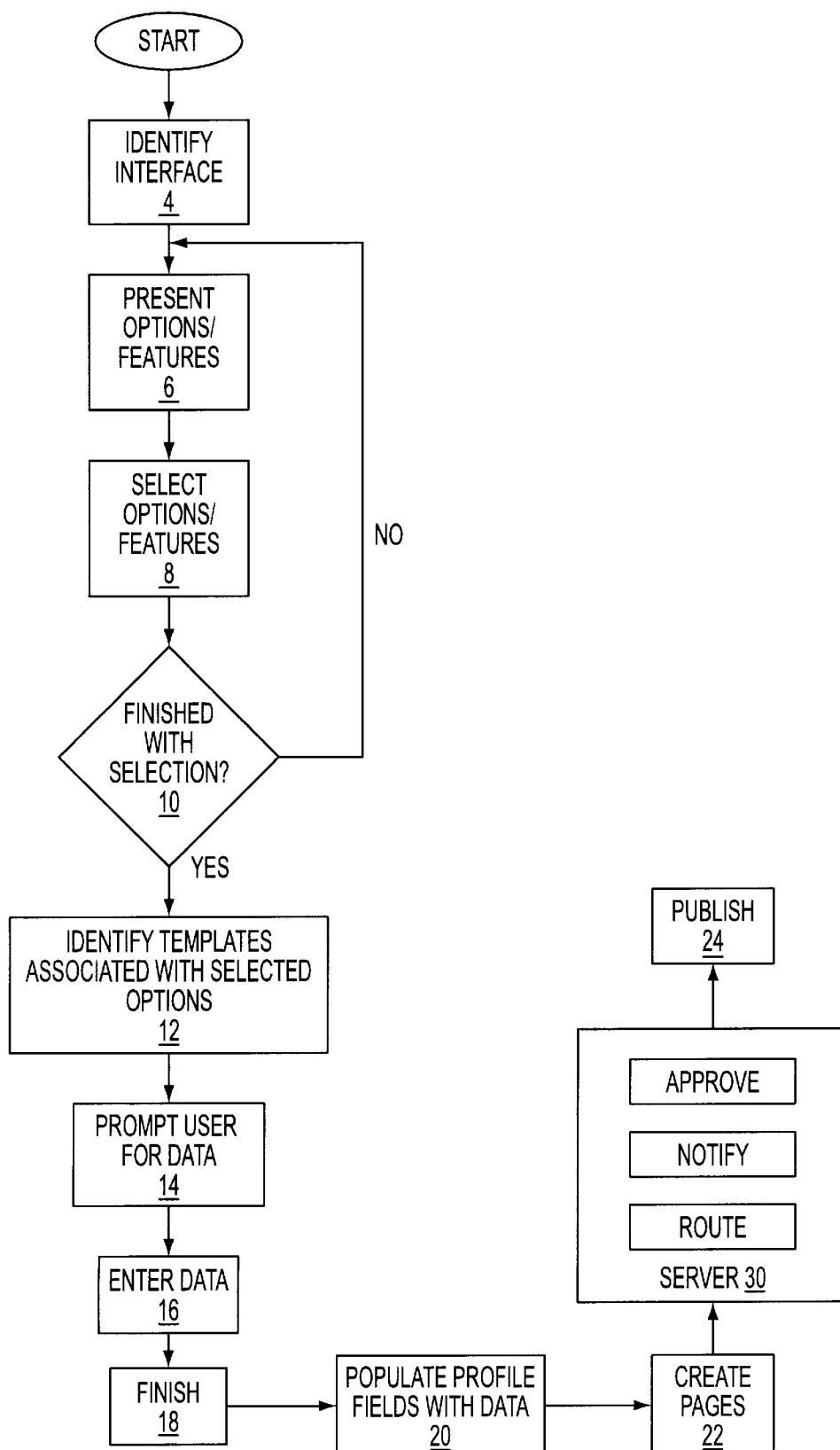


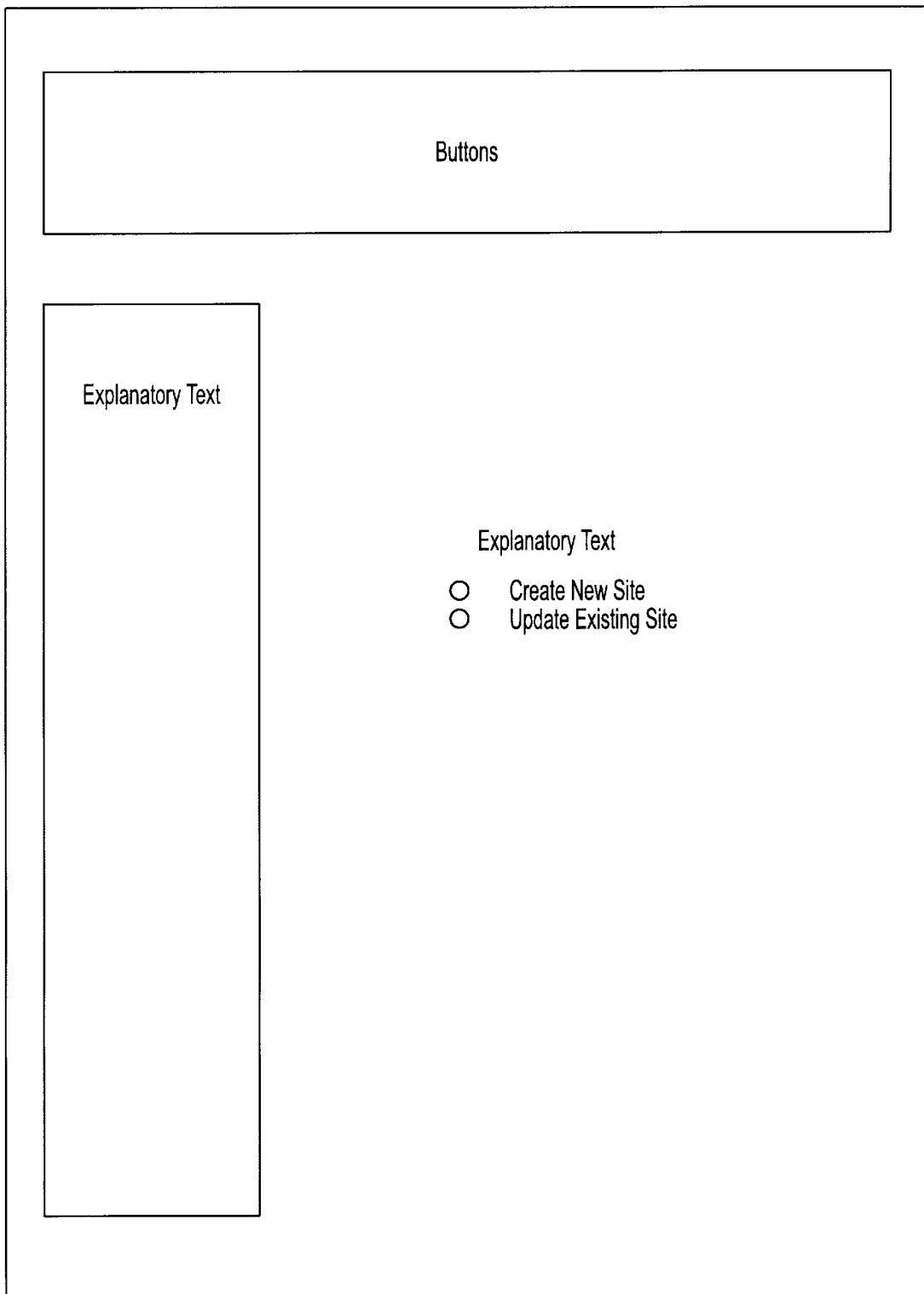
FIG. 3

**U.S. Patent**

Feb. 6, 2001

Sheet 5 of 29

**US 6,185,587 B1**



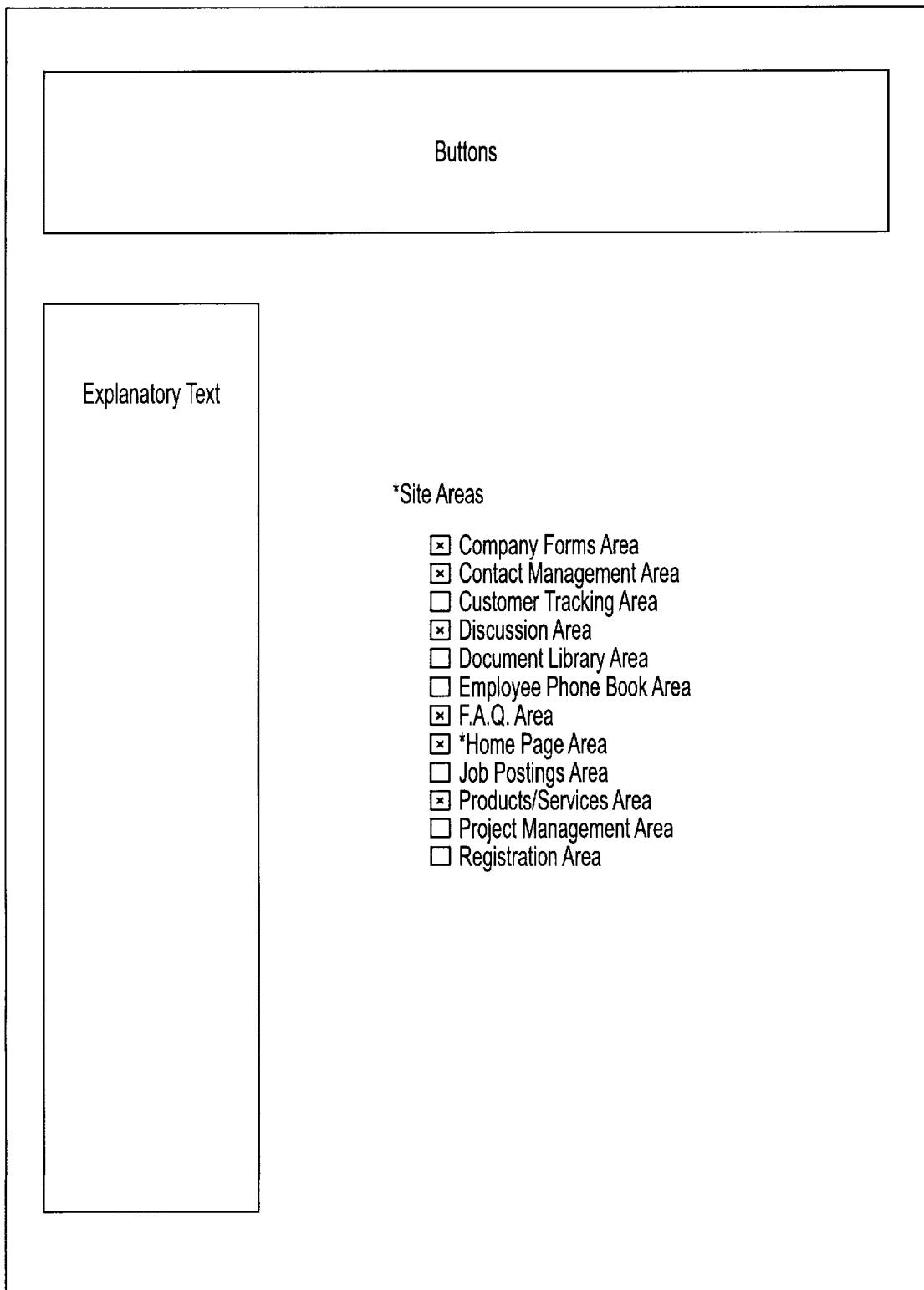
**FIG. 4**

**U.S. Patent**

Feb. 6, 2001

Sheet 6 of 29

**US 6,185,587 B1**



**FIG. 5**

U.S. Patent

Feb. 6, 2001

Sheet 7 of 29

US 6,185,587 B1

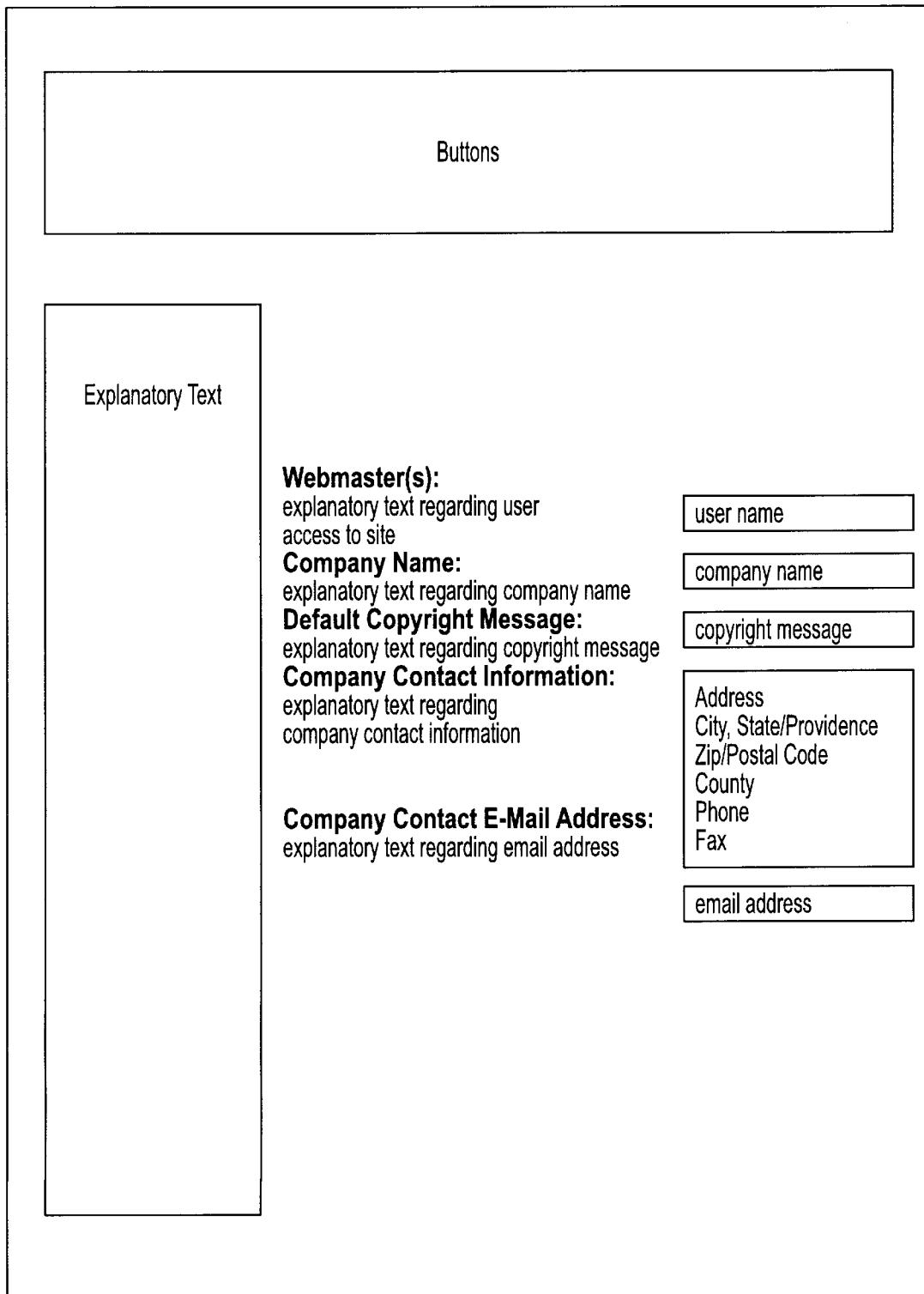


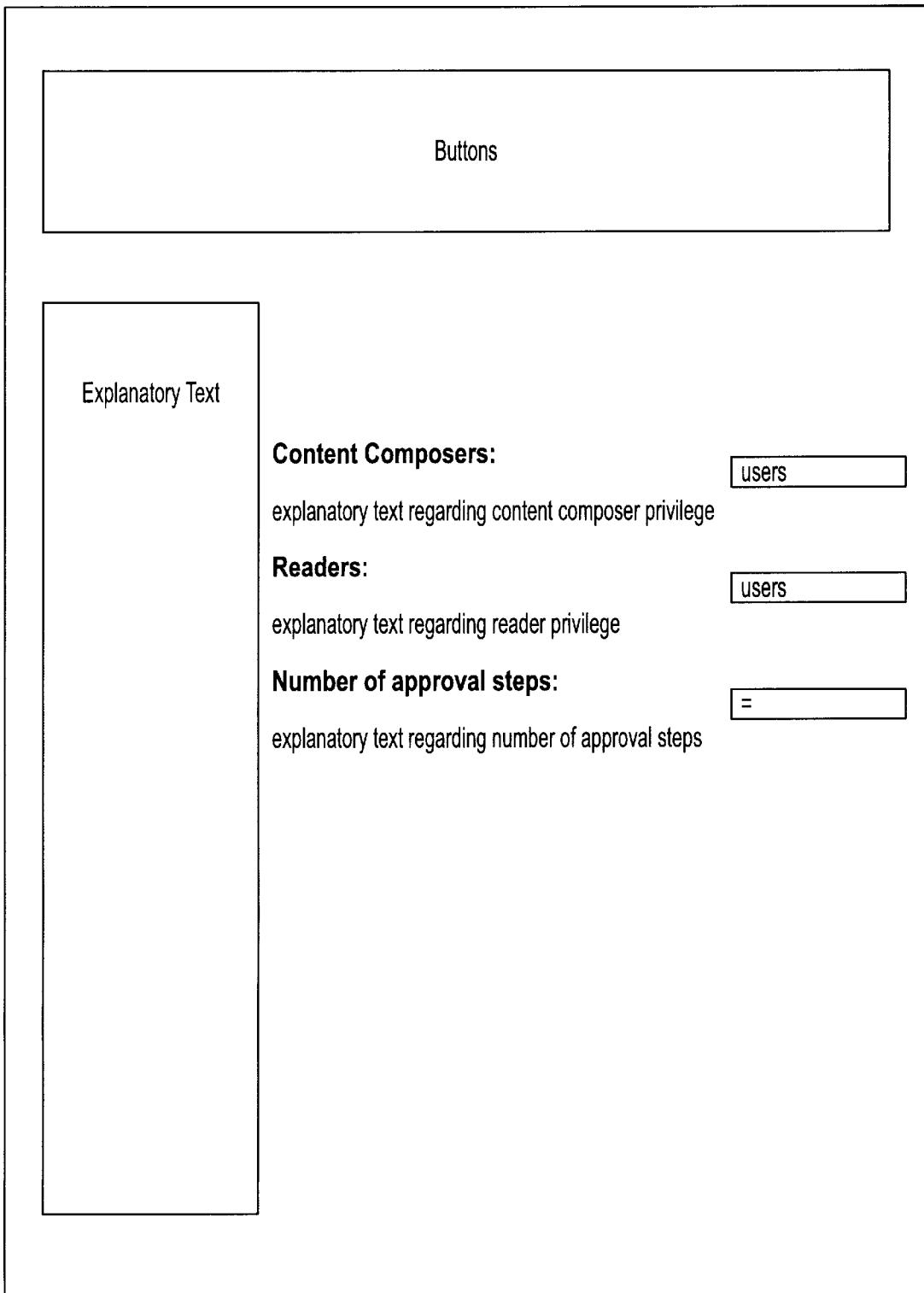
FIG. 6

**U.S. Patent**

Feb. 6, 2001

Sheet 8 of 29

**US 6,185,587 B1**



**FIG. 7**

**U.S. Patent**

Feb. 6, 2001

Sheet 9 of 29

**US 6,185,587 B1**

Buttons		
Explanatory Text	<b>Frame Settings</b>	
	Frame Layout: Explanatory text regarding frame layout	frame choice
	Frame Style: Explanatory text regarding frame style	style
	Logo: Explanatory text regarding logo style	logo
	<b>Document Settings:</b>	
Background Logo: Explanatory text regarding backgrounds attached to a Site Image document	background	
Background Color: Explanatory text regarding background color	color	
Text Color:	color	

**FIG. 8**

**U.S. Patent**

Feb. 6, 2001

Sheet 10 of 29

**US 6,185,587 B1**

Buttons

Explanatory Text

Which type of update?

- Modify All Site Areas
- Modify Individual Areas

**FIG. 9**

**U.S. Patent**

Feb. 6, 2001

Sheet 11 of 29

**US 6,185,587 B1**

Buttons

Explanatory Text

Make your selection, then click the "Next" button below.

- Add Site Images
- View/Update Site Images

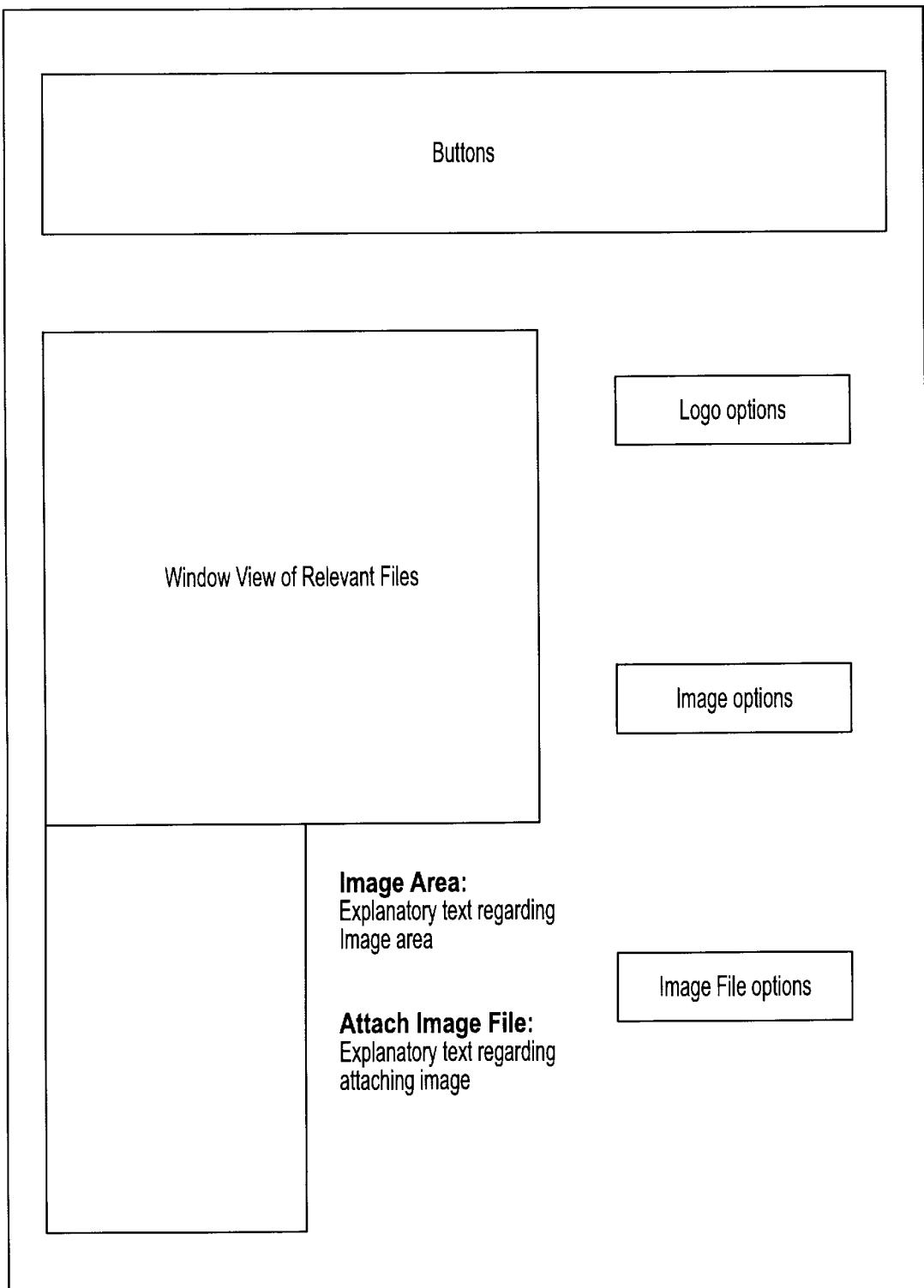
**FIG. 10**

**U.S. Patent**

Feb. 6, 2001

Sheet 12 of 29

**US 6,185,587 B1**



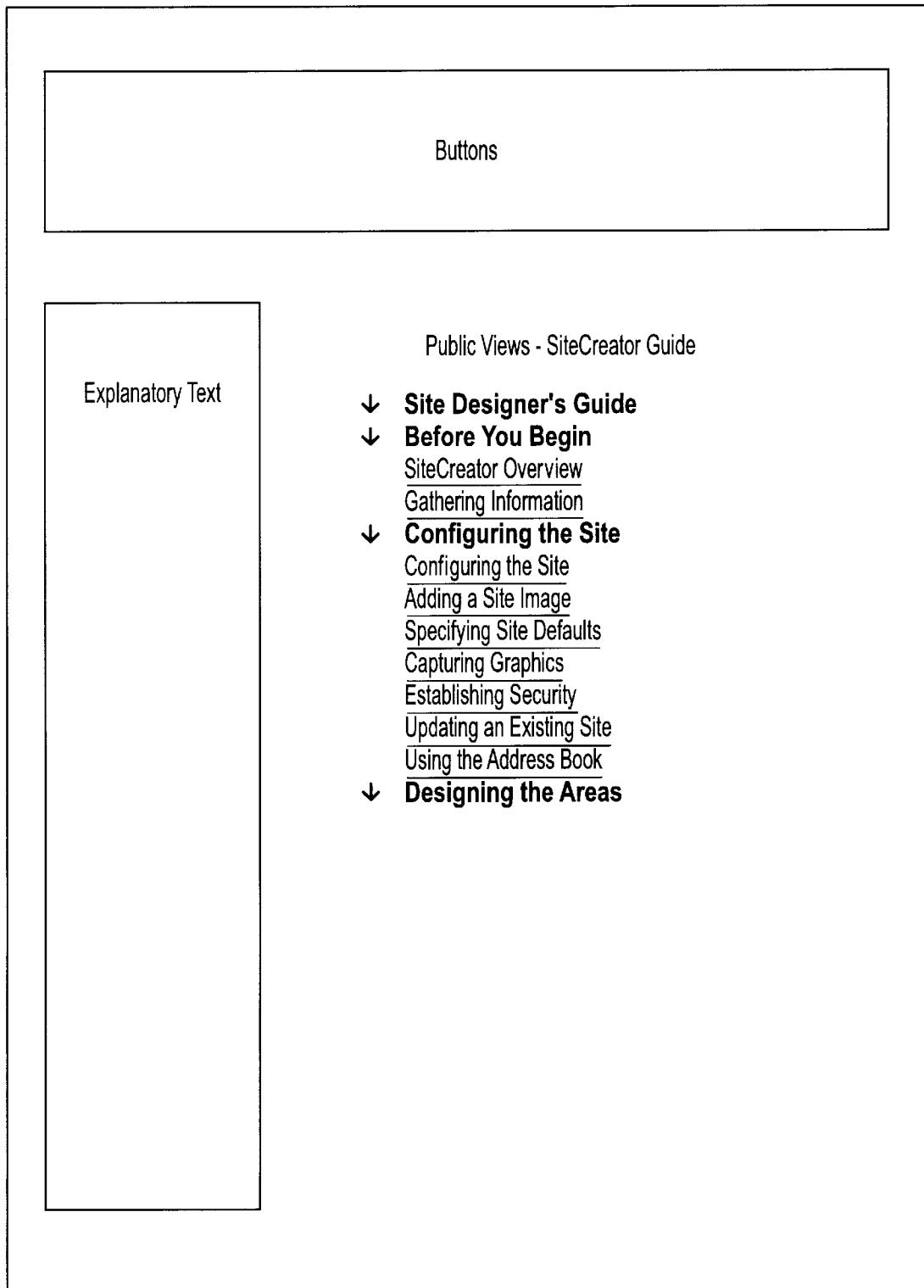
**FIG. 11**

**U.S. Patent**

Feb. 6, 2001

Sheet 13 of 29

**US 6,185,587 B1**



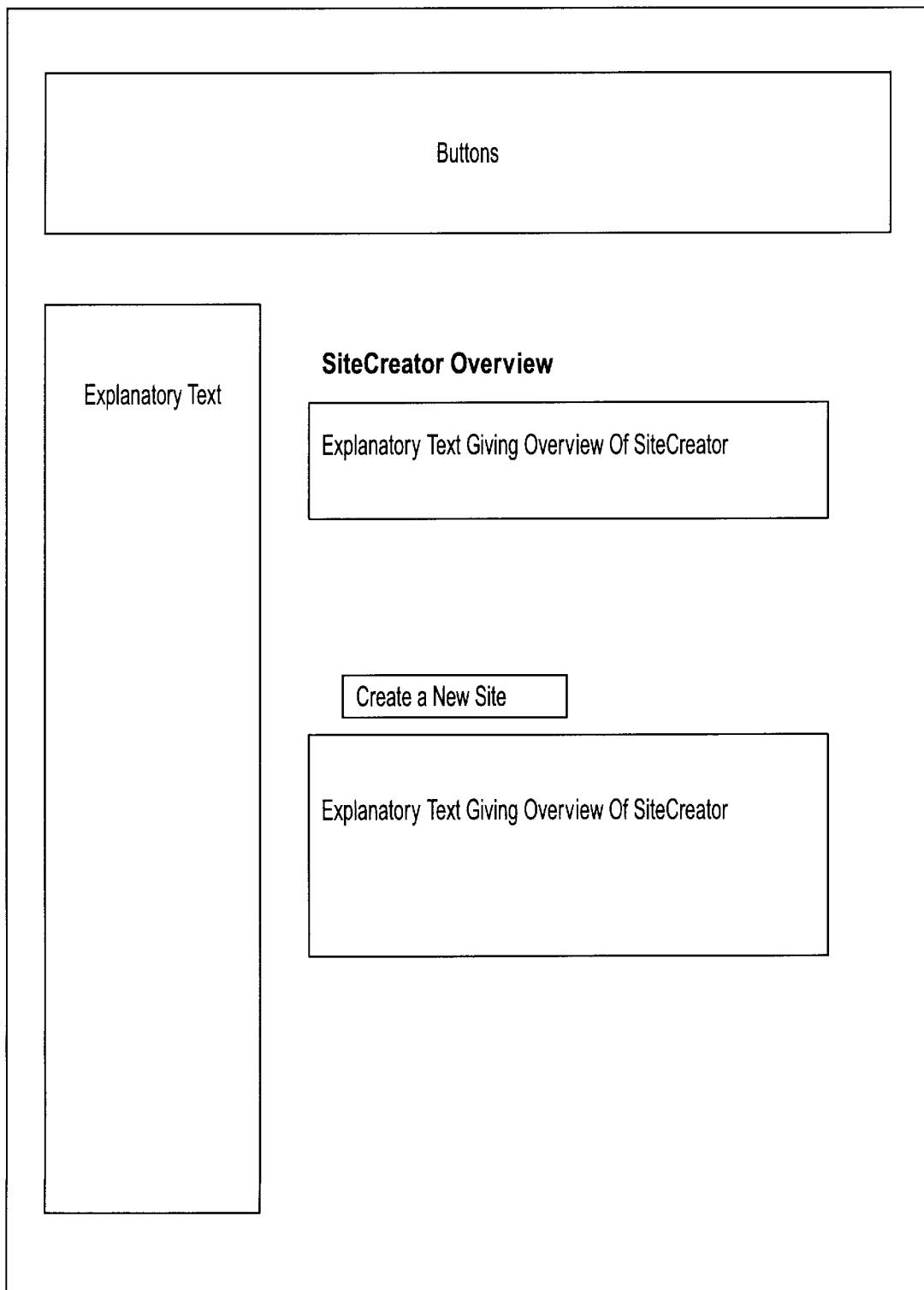
**FIG. 12**

**U.S. Patent**

Feb. 6, 2001

Sheet 14 of 29

**US 6,185,587 B1**



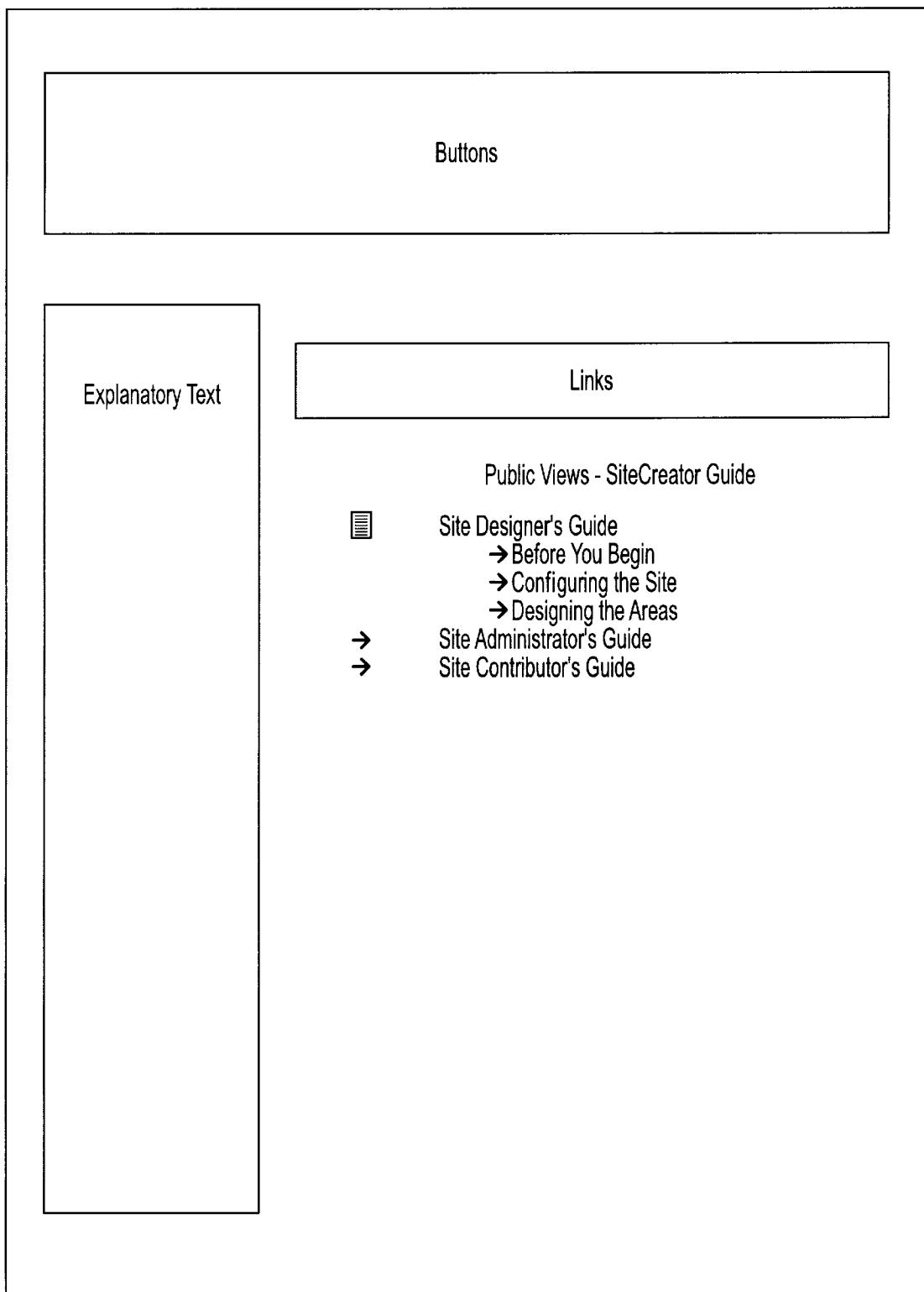
**FIG. 13**

**U.S. Patent**

Feb. 6, 2001

Sheet 15 of 29

**US 6,185,587 B1**



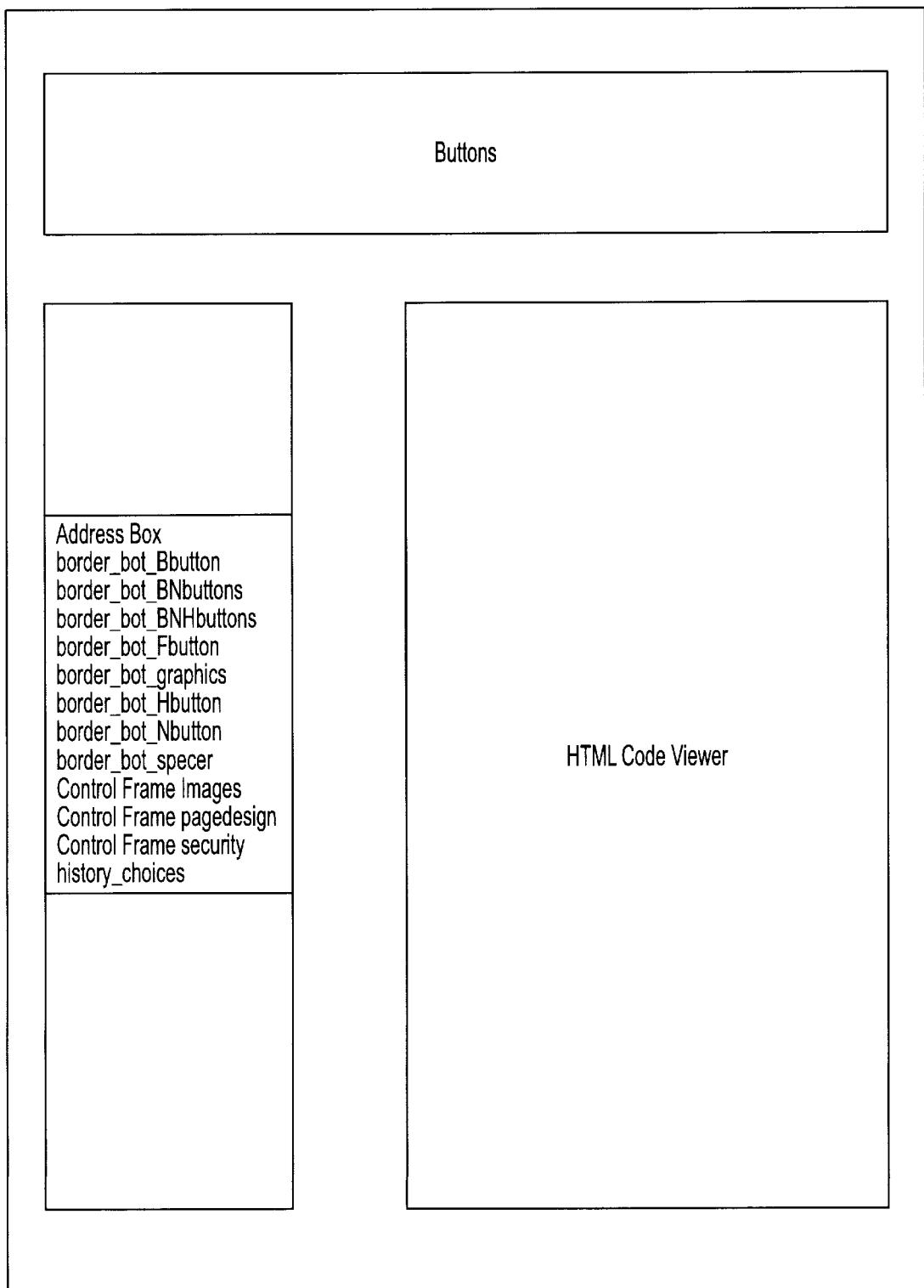
**FIG. 14**

**U.S. Patent**

Feb. 6, 2001

Sheet 16 of 29

**US 6,185,587 B1**



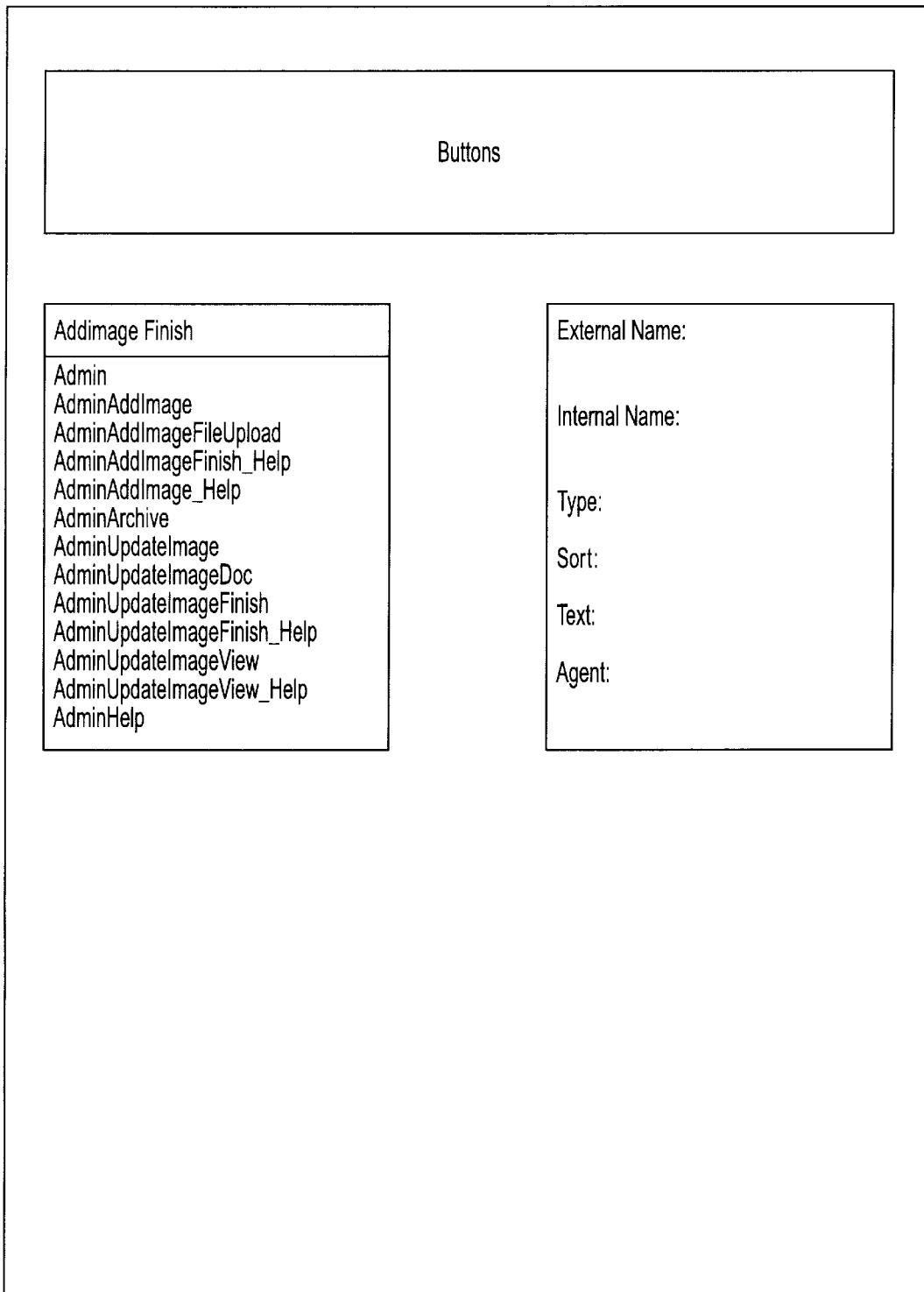
**FIG. 15**

**U.S. Patent**

Feb. 6, 2001

Sheet 17 of 29

**US 6,185,587 B1**

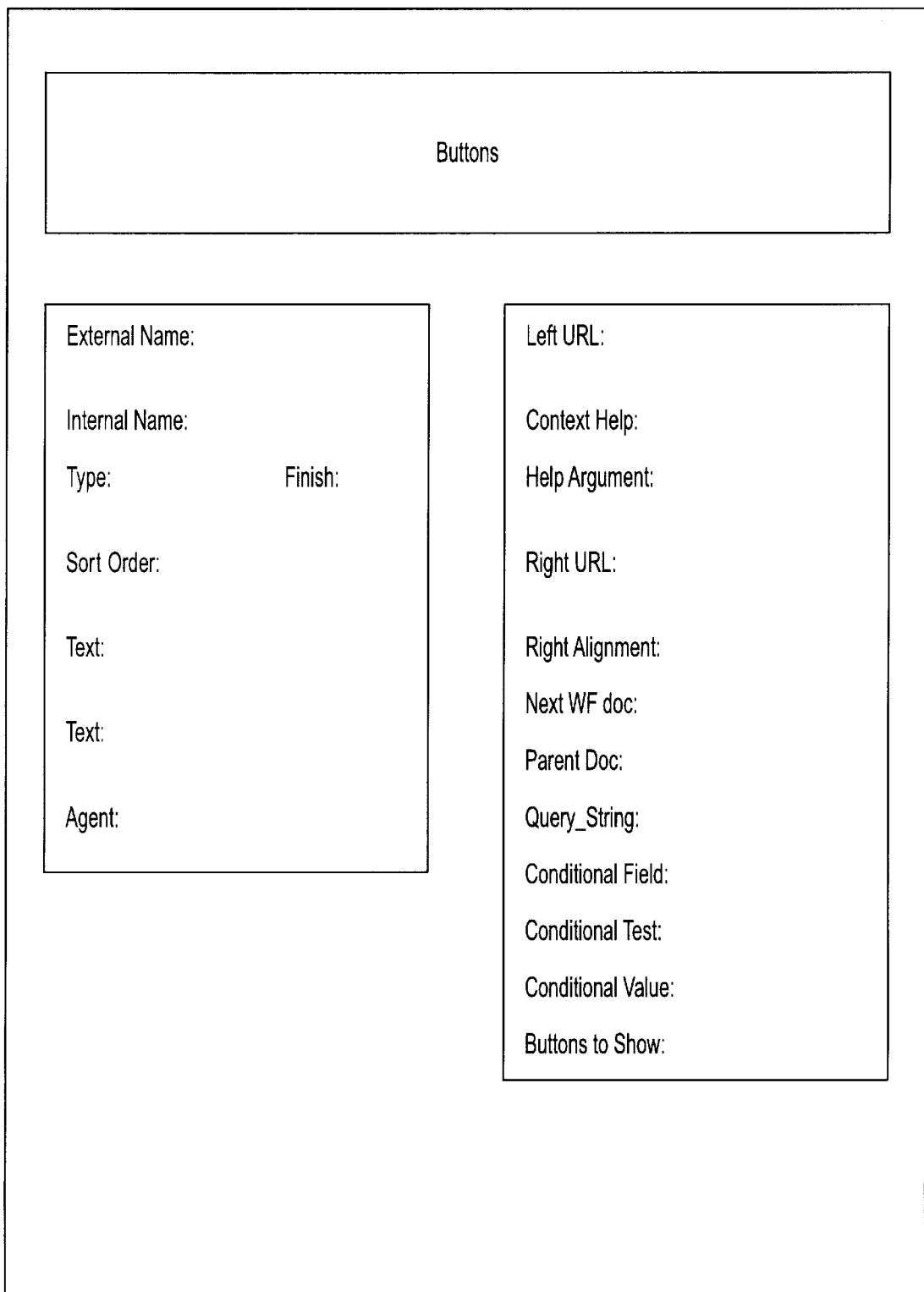


**FIG. 16**

**U.S. Patent**

Feb. 6, 2001

Sheet 18 of 29

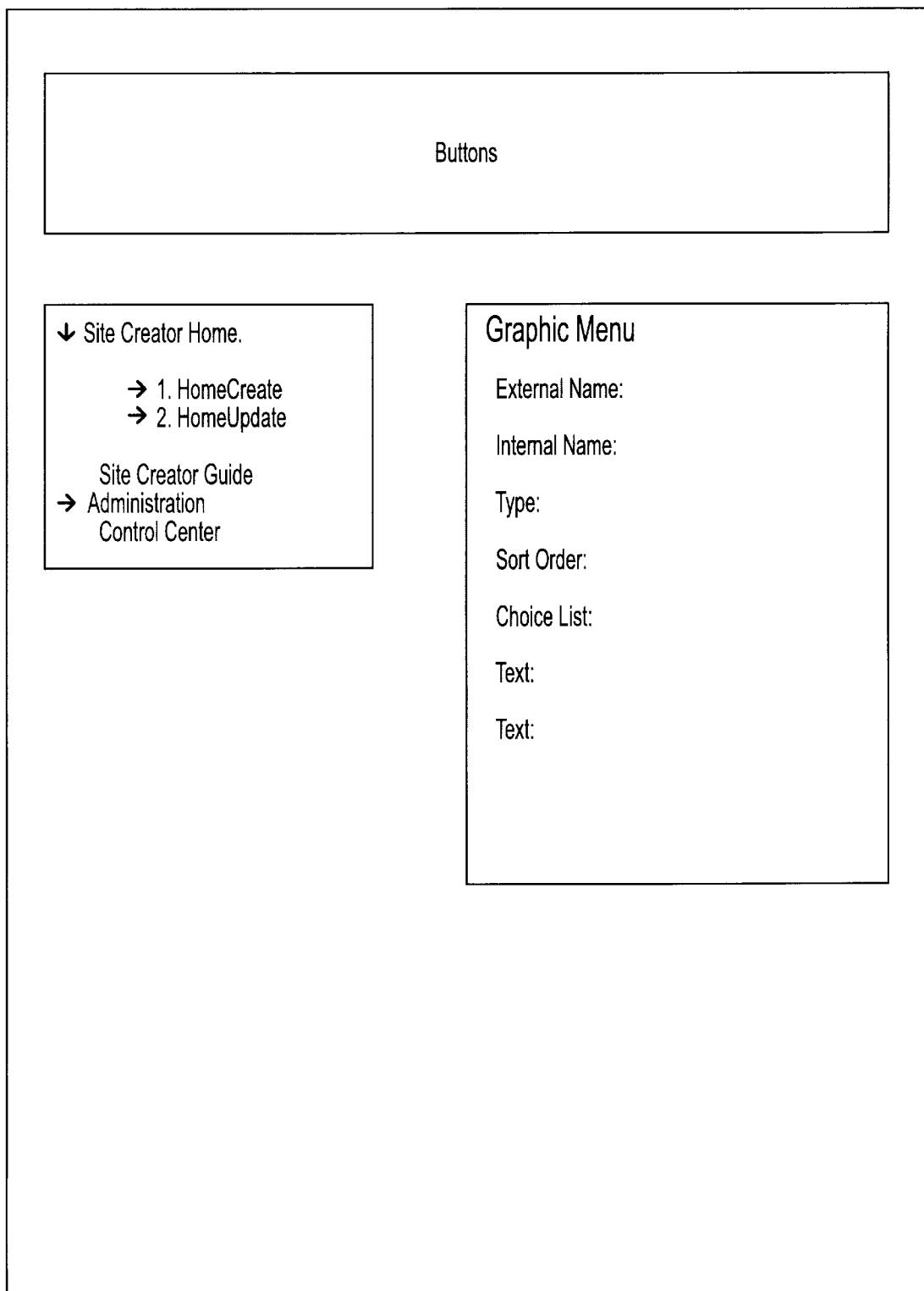
**US 6,185,587 B1****FIG. 17**

**U.S. Patent**

Feb. 6, 2001

Sheet 19 of 29

**US 6,185,587 B1**



**FIG. 18**

**U.S. Patent**

**Feb. 6, 2001**

**Sheet 20 of 29**

**US 6,185,587 B1**

Buttons

2. Home Update

1. Home Update Site

1. Home Update Site Co Info

1. Home Update Site Co Info Site Profile (PIN: wwwSiteProfile-flag:)
2. Home Update Site Co Info Site Profile Finish (PIN: Home Update Site Co Info Site)

2. Home Update Site Security

3. Home Update Site Design

1. Home Update Site Design Center (PIN: wwwDesign CenterProfile - flag:)
2. Home Update Site Design CenterFinish (PIN: Home Update Site Design Center)

4. Home Update Site Areas

2. Home Update Area

1. Home Update Area Security

2. Home Update Area Page Design

3. Home Update Page Copyright

4. Home Update Area

**FIG. 19**

**U.S. Patent**

Feb. 6, 2001

Sheet 21 of 29

**US 6,185,587 B1**

Create Document Library Page

Select Logo or Banner:	<input type="text" value="logo"/>
Title:*	<input type="text" value="title"/>
Subtitle:	<input type="text" value="subtitle"/>

**FIG. 20**

**U.S. Patent**

Feb. 6, 2001

Sheet 22 of 29

**US 6,185,587 B1**

<b>Internal Name:</b> Enter the internal name of the object	ContractsHomePage
<b>Multiple Object Lookup Name:</b> Usually the same as Internal Name. In some cases it is used to allow for one object to be looked up multiple ways.	AreaHomePage
<b>External Name:</b> Enter the external name of this object.	Contracts Main Page

**FIG. 21**

**U.S. Patent**

Feb. 6, 2001

Sheet 23 of 29

**US 6,185,587 B1**

**Primary Area Internal Name:**

Enter the internal name of the primary area this object goes with.

Contracts

**Primary Area External Name:**

Enter the external name of the primary area this object goes with.

Contracts Area

**Area(s) belong:**

Enter the area(s) that this object goes with (AppAssembler will copy this document to these areas).

Contracts

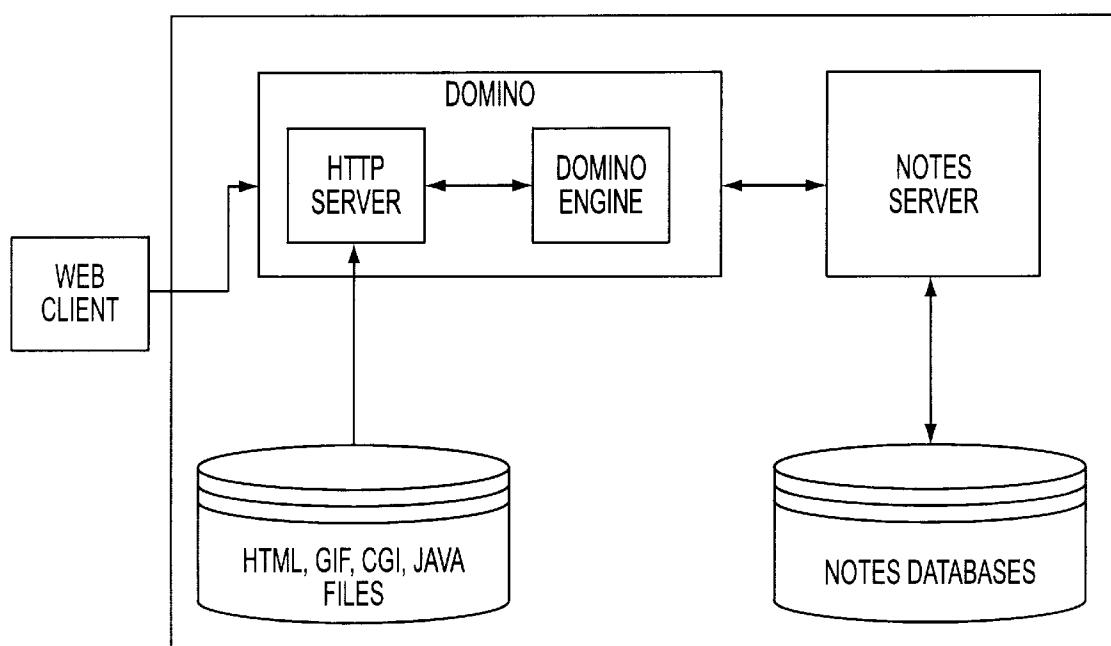
**FIG. 22**

**U.S. Patent**

Feb. 6, 2001

Sheet 24 of 29

**US 6,185,587 B1**



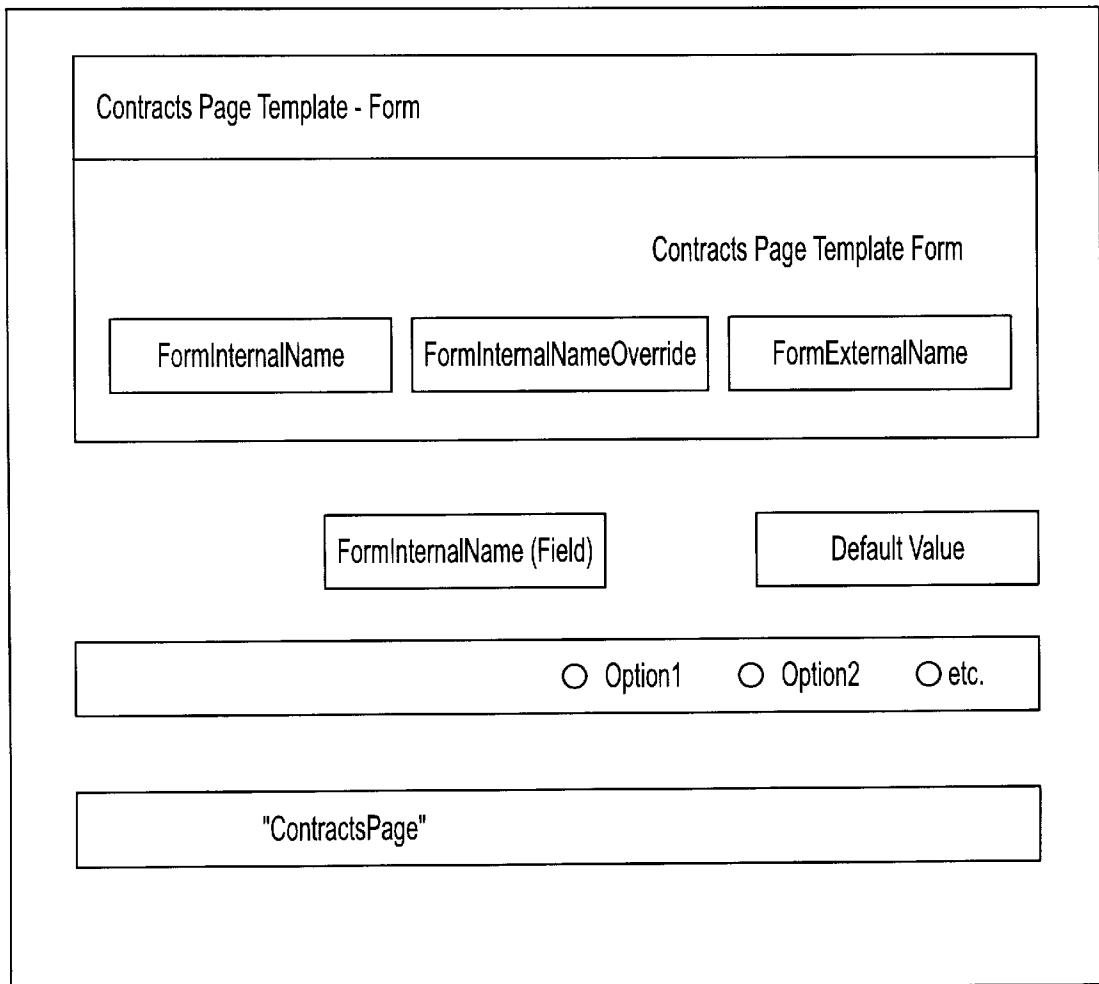
**FIG. 23**

**U.S. Patent**

Feb. 6, 2001

Sheet 25 of 29

**US 6,185,587 B1**



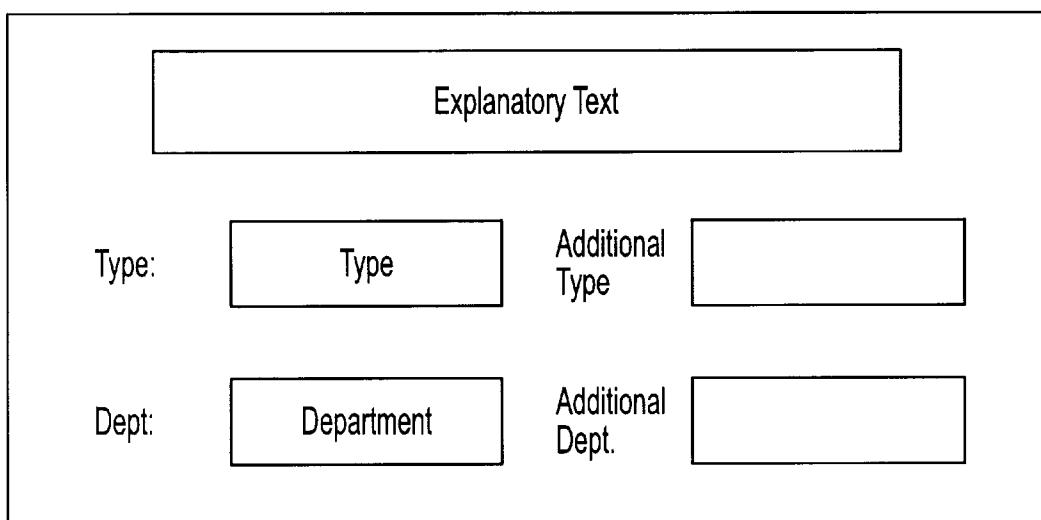
**FIG. 24**

**U.S. Patent**

Feb. 6, 2001

Sheet 26 of 29

**US 6,185,587 B1**



**FIG. 25**

**U.S. Patent**

Feb. 6, 2001

Sheet 27 of 29

**US 6,185,587 B1**

Domino Library - Design

→ Folders and Views	Other Options
Agents	Other Options
↓ Design	Other Options
Forms	Other Options
Subforms	Other Options
	Display Side Bullet Text1
	Other Options

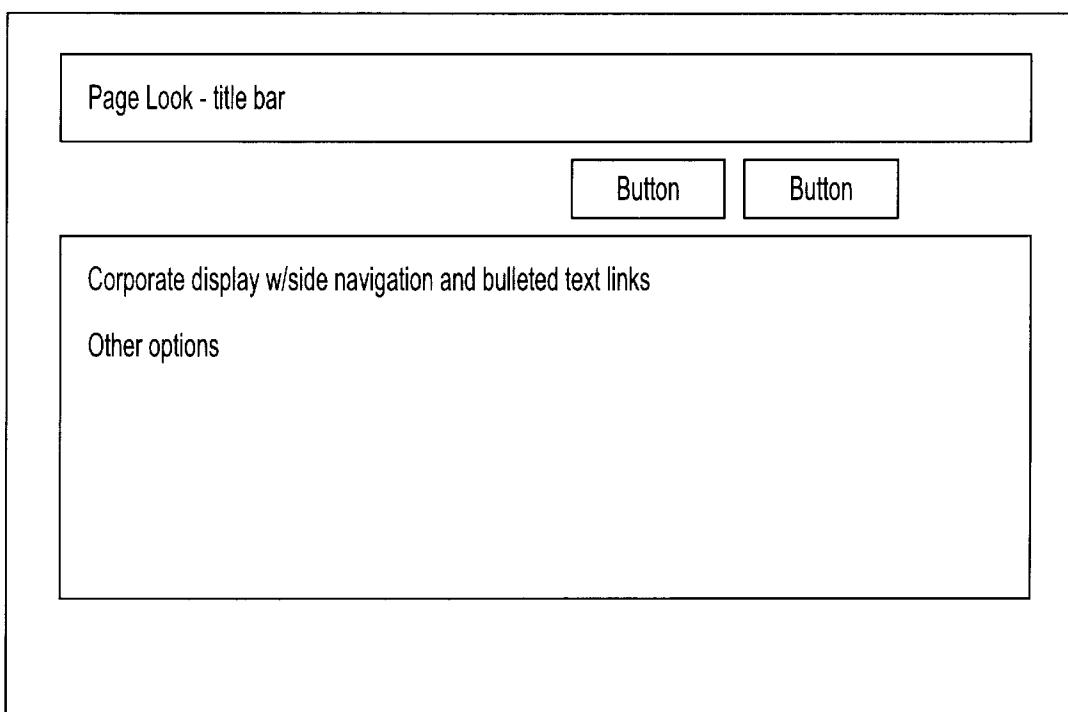
**FIG. 26**

**U.S. Patent**

Feb. 6, 2001

Sheet 28 of 29

**US 6,185,587 B1**



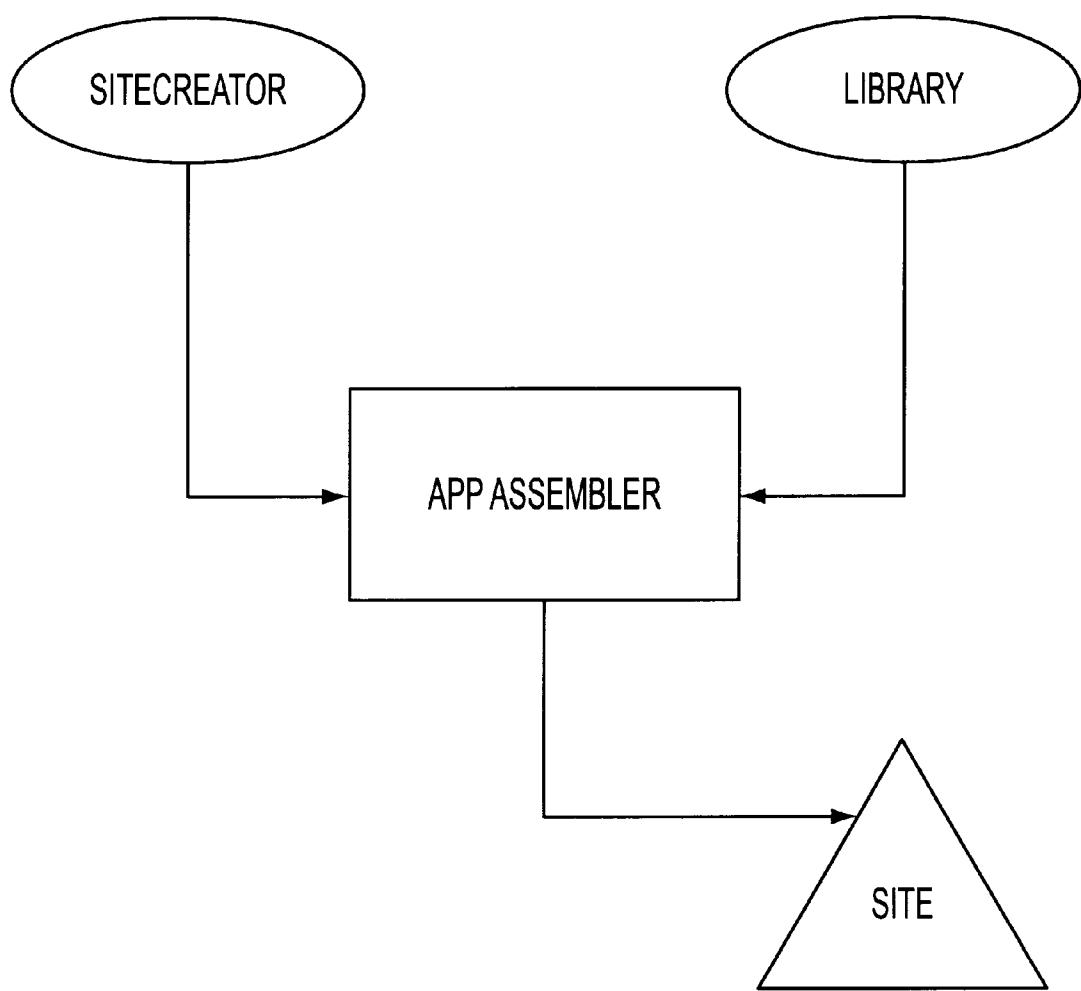
**FIG. 27**

**U.S. Patent**

Feb. 6, 2001

Sheet 29 of 29

**US 6,185,587 B1**



**FIG. 28**

## US 6,185,587 B1

1

**SYSTEM AND METHOD FOR BUILDING A WEB SITE WITH AUTOMATED HELP****RELATED APPLICATIONS**

This application claims priority based on U.S. Provisional Patent Application Ser. No. 60/050,154, entitled "Web Site Creation Development Tool," and U.S. Provisional Patent Application Ser. No. 60/050,153, entitled "Web Server Application," each filed Jun. 19, 1997. This application is also related to co-pending U.S. patent applications entitled, "Web Site Creator", Ser. No. 09/100,222, pending, filed herewith, "System and Method for Building a Web Site Using Stored Pages," Ser. No. 09/100,136, pending, filed herewith, "Automated System and Method for Approving Web Site Content," Ser. No. 09/100,135, pending, filed herewith, "System and Method for Building a Web Site Using User Specific Interface," Ser. No. 09/100,224, pending, filed herewith, "System and Method for Building a Web site for Use in E-Commerce With User Specific Pricing," Ser. No. 09/100,226, pending, filed herewith, "System and Method for Building a Web Site With Automated Workflow," Ser. No. 09/100,116, pending, filed herewith.

**FIELD OF THE INVENTION**

The present invention relates to a software tool for creating web sites where the tool itself can be used to create HTML-formatted help documents pertaining to use of the tool and use of a web site created by the tool.

**BACKGROUND OF THE INVENTION**

With the proliferation of the Internet and intranets, there has been an increasing demand for the creation of Web sites. A Web site typically includes multiple pages having a predefined structure or layout for presenting content which, unlike the structure, may be updated and changed frequently. The structure of the page may include various arrangements of menus to navigate the site, windows or "frames" including navigation and other tools, and specifically formatted content in predefined areas of the frames. Content may include various objects and object types including, for example, text, graphics, other media and multimedia material such as audio and video presentations, and links to other objects including other Web pages. Both components defining a Web page, that is, page structure and content, are specified using hypertext markup language (HTML).

The Web site organization is defined by the various Web page links. An initial entry node in the organization of links is called the Home Page which, through the various links, allows a user to navigate to and access other objects including other objects on the current referencing page, other pages of the current Web site and objects and pages on other Web sites. The Home Page may include an overview of the structure and content of the Web site, display options (e.g., provide text only, include graphics and/or frames, etc.), and provide the links to other Web site pages: HTML documents and other objects. Thus, HTML is used to define the layout or structure of the Web pages and to provide content and links to other objects.

Among the inherent difficulties in creating and maintaining such Web sites is that the HTML used to define the Web pages (and therefore the structure, organization and content of the Web site) is difficult to compose and read. HTML is a specialized language with its own syntax, codes and terminology that requires specialized knowledge and training to interpret, understand and write. This precludes individuals without specific HTML knowledge and experience from creating a Web site or including content on a Web site, the content also being expressed in HTML.

2

Another difficulty is presented to a user of the Web site accessing the various Web pages and objects over the Internet. In particular, as Web sites have become more complex, users have been required to become more knowledgeable about accessing and using Web site features. For example, certain Web sites may incorporate advanced features only supported by certain Web browsers or versions of Web browsers. Other Web sites require specialized helper applications, viewers or audio players to receive certain presentations. Web site complexity has also evolved as sites have expanded.

While Web sites include various links to objects, some of which may provide assistance in connection with the use of the referencing object, there is no standardized facility of help documents provided on such Web sites. Further, even if a Web site creator attempted to include a library of such help documents with appropriate links, two problems would need to be addressed. First, the Web site creator would need to address identifying, authoring, and implementing help pages that would be displayable using a browser and be displayed in an appropriate portion of the user's display screen.

Secondly, the Web site creator would need to provide means so that the help facility would be context sensitive, i.e., provide information relating to the object being accessed or task being performed by the user. Should a Web site creator attempt to create such a help facility, they would again be faced with the problem of its implementation using HTML coding.

**SUMMARY OF THE INVENTION**

One object of the invention is to overcome these and other deficiencies and drawbacks of Web site creation techniques, systems and methods.

Another object of the invention is to provide a software tool for creating web sites where the tool itself can be used to create HTML-formatted help documents pertaining to use of the tool and use of a web site created by the tool.

Another object of the invention is to provide a software tool for creating web sites where the tool itself can be used to create HTML-formatted help documents based on a library of stored HTML-formatted templates.

Another object of the invention is to provide a software tool for creating web sites where the tool itself can be used by the tool developer or a person creating a web site using the tool to create HTML-formatted help documents based on a library of stored HTML-formatted templates associated with the tool.

Another object of the invention is to provide a tool for creating a Web site with context-sensitive help functions using HTML templates to minimize or eliminate the need for a Web site creator to know or use HTML or other programming languages to create a Web site or help documents pertaining to the finished web site.

Another object of the invention is to provide a tool for creating a Web site where the tool comprises a library of stored templates (including fields) associated with different options/features for a Web site, and various help documents relating to the options/features. The tool prompts a user of the tool to select desired options/features from a list of possible options/features. Based upon the option/features selected, the tool determines which of the stored templates (and fields) are to be used and the user is prompted to supply data to populate those fields. The tool uses the templates and

## US 6,185,587 B1

**3**

user supplied data to create the web pages that make up a Web site. It also identifies the help documents that relate to the selected features/options and includes their help documents in the web site. The Web site may then be posted on a network, such as the Internet.

Another object of the invention is to provide a tool which can be readily customized by a developer to support the creation of customized classes of Web sites by respective classes of Web site creators by providing (i) a library of Web page templates; (ii) a library of Web site creator Help objects associated with the Web page templates and providing information about using the Web page templates; (iii) a library of user Help objects associated with Web pages and objects created using respective Web page templates and providing information to Web users accessing those Web pages; (iv) a Help facility to guide a developer through the creation of custom Web page templates and associated Web site creator and Web site user Help objects; (v) a Web site creator Help facility including the standard and custom Web site creator objects to help a Web site creator use the templates and other tool facilities to create a Web site; and (vi) as part of the Web site, a user Help facility including the Web site user Help objects to assist a user accessing the Web site to navigate and utilize features and functions of the Web site.

According to one embodiment of the invention, a software tool is provided for use with a computer system for simplifying the creation of a customized Web site by avoiding the need for the web site creator to know or use HTML, or other programming language to create the web site. The tool comprises a plurality of pre-stored HTML templates. The templates preferably correspond to different types of Web pages and features commonly found on Web sites. The tool further includes a library of Help documents in HTML format, with each of the help documents being associated with one or more templates.

This embodiment of the invention provides for the automated generation of a web site, with help pages that are included in the site based on features/options of the site selected by the web site creator during the site creation process. Another aspect of the invention relates to enabling context-sensitive help documents to be automatically included in a web site with links from the portion of a web page to which the help pertains, without requiring the web site creator to write or modify any code.

According to further features of the invention, new features and options may be created from templates and associated help documents may be associated therewith. Advantageously, these help documents may be created from help templates to avoid the need to write code.

According to one embodiment of the invention, a software tool is provided for use with a computer system for simplifying the creation of a customized Web site by avoiding the need for the web site creator to know or use HTML or other programming language to create the web site. The tool comprises a plurality of pre-stored HTML templates. The templates preferably correspond to different types of Web pages and features (e.g. site areas) commonly found on Web sites. The tool further includes a library of Help documents associated with the templates. The help documents are preferably HTML documents created from one or more of the templates. The help documents include fields that link the document with one or more related fields of other templates to associate each help document with one or more features and/or fields. In this way, context-sensitive help can be provided. For example, particular web pages or

**4**

portions of a web page (e.g., a field) may have specific help documents associated therewith. The areas of the web site having associated help pages may be graphically marked (e.g., an icon with a ? or by colored highlighting) to indicate the existence of a help page for the particular field or other portion of a Web page. In other cases, a help icon may appear generally on the page to indicate help available for the page.

The help documents created by the tool (preferably from one or more templates) can provide help information about using the site creator tool, using a web site created by the tool or using the tool to modify a web site created by the tool.

An example of this type of automated generation of a help page would be a page on a web site designed to enable users to purchase a particular product. The tool may create a help page to assist with purchasing the product on the web site. A specific field (e.g., method of payment) may have specific information about that topic.

One embodiment of the invention enables a developer to use the tool to add to or modify existing help page templates. These new or modified templates may be stored in a storage device (e.g., database 40) become part of the tool and be accessible for subsequent use.

Other embodiments and uses of the invention will be apparent to those skilled in the art from consideration of the specification and practice of the invention disclosed herein. The specification and examples should be considered exemplary only. The scope of the invention is only limited by the claims appended hereto.

## BRIEF DESCRIPTION OF THE DRAWINGS

FIG. 1 is a schematic block diagram illustrating an overall system in accordance with one embodiment of the invention.

FIG. 1A depicts a schematic block diagram illustrating an overall system in accordance with one embodiment of the invention.

FIG. 2 is a schematic block diagram illustrating an overall system in accordance with one embodiment of the invention.

FIG. 3 is a schematic flow diagram illustrating one embodiment of the site creation process.

FIG. 4 is an illustration depicting a screen showing a selection menu.

FIG. 5 is an illustration depicting a screen showing a site area selection menu.

FIG. 6 is an illustration depicting a screen showing information input fields.

FIG. 7 is an illustration depicting a screen showing information input fields.

FIG. 8 is an illustration depicting a screen showing a selection menu.

FIG. 9 is an illustration depicting a screen showing a selection menu.

FIG. 10 is an illustration depicting a screen showing a selection menu.

FIG. 11 is an illustration depicting a screen showing information input fields.

FIG. 12 is an illustration depicting a screen showing a selection menu.

FIG. 13 is an illustration depicting a screen showing overview information.

FIG. 14 is an illustration depicting a screen showing various site information.

## US 6,185,587 B1

5

FIG. 15 is an illustration depicting a screen showing various site options.

FIG. 16 is an illustration depicting a screen showing a selection menu.

FIG. 17 is an illustration depicting a screen showing the contents of a computer desktop.

FIG. 18 is an illustration depicting a screen showing various source documents.

FIG. 19 is an illustration depicting a screen showing various source documents.

FIG. 20 is an illustration depicting a screen showing information input fields.

FIG. 21 is an illustration depicting a screen showing information input fields.

FIG. 22 is an illustration depicting a screen showing information input fields.

FIG. 23 is an schematic diagram illustrating one embodiment of the system.

FIG. 24 is an illustration depicting a screen showing a template form.

FIG. 25 is an illustration depicting a screen showing information input fields.

FIG. 26 is an illustration depicting a screen showing options.

FIG. 27 is an illustration depicting a screen showing options.

FIG. 28 is a block diagram illustrating the AppAssembler.

#### DESCRIPTION OF THE PREFERRED EMBODIMENTS

One embodiment of the invention provides a tool, system and method for creating Web sites. The tool facilitates the creation of a customized Web site without requiring a Web site creator to write or edit HTML code. A Web site created with the tool has several advantages that can be exploited after the Web site is created. The tool also enables various advantages in connection with modifying a Web site created using the tool.

As schematically illustrated in the block diagram of FIG. 1, one aspect of the invention relates to a client/server network system 110 enabling access to both HTML objects 150a-150n (e.g. HTML documents) and non-HTML objects 118a-118n using a web browser 128 residing on a terminal 126. Preferably, web browser 128 supports Internet and Web protocols (e.g., HyperText Transfer Protocol (HTTP) and TCP/IP). The system may further comprise a client 112 to enable a non-browser client access to non-HTML server module 124 to retrieve non-HTML objects 118a-118n from non-HTML database 116.

A server 114 preferably comprises a HTTP server module 130, interface module 132 and non-HTML server module 124. As further illustrated in FIG. 1, the server side of system 110 may comprise a non-HTML database 116 in communication with server 114. Preferably, non-HTML database 116 stores one or more non-HTML objects 118a-118n, each at least some of which having one or more non-HTML fields 162a-162n, and a user directory 120. User directory 120 includes one or more user objects 122a-122n. User objects 122a-122n may include information about a user (e.g., electronic mail address, role, profile, etc.). Terminal 126 and server 114 can be in communication via a network 154 (e.g., Internet, Intranet or other network).

According to one aspect of the invention, a user submits a URL-based request for an object via browser 128. The

6

request is passed to server 114 using HTTP (or other protocol). Server 114 receives the request via HTTP server module 130 and passes object location information to interface module 132 via URL interface 146. URL interface 146 transmits that information to non-HTML server module 124. Non-HTML server module 124 retrieves the requested object and passes it to interface module 132. A HTML translator portion 144 of interface module 132 translates the non-HTML object to a HTML representation of the requested object and the HTML representation is returned to browser 128 via HTTP server module 130.

System 110 also enables browser 128 to access HTML objects 150a-150n using HTTP server 130 or a conventional web server 156 in a known manner. A conventional editor 15 may be used to edit HTML objects within the system. A conventional technique (e.g., a computer gateway interface (CGI)) may be used to store the edited HTML objects in the HTML database.

Thus, one advantage of the invention is that server 114 enables a browser 128 to request both HTML objects 150a-150n and non-HTML objects 118a-118n. Additional advantages derive from this capability. For example, one significant advantage is that the invention exposes powerful resources available in non-HTML databases 116 to a web browser 128 according to one embodiment of the invention.

According to one embodiment of the invention shown in FIG. 2, the tool may be installed on a server 30. Installation of the tool on other types computer systems is also possible. Server 30 may be connected to various client terminals 34. Typically, client terminal 34 may include a display 101 capable of presenting views 102. Terminal 34 may also preferably include an input device 106. The tool preferably is able to access a database 40 wherein a library of templates, views, and fields may be stored.

According to one embodiment of the invention, the tool enables a Web site creator to select from among a plurality of features and options to include within a Web site. The tool further comprises a library of templates (e.g., text, fields, HTML code and formulas) that correspond to the available features and options. The templates comprise databases which may include fields, forms, views, text, formulas and profiles that enable customization of the features. A profile may comprise fields, some of which may be designated as required fields. For example, one feature of a Web site may be a list of site areas. One area may be "Company Information." A template corresponding to this feature may include certain text and HTML formatting components for a Web page for this area, with fields for company name, address, contact person, etc. Based on input supplied by the Web site creator, this information may be included in the finished Web site without requiring the Web site creator to write or edit HTML code. The tool provides several stored views to present the various options/features to the Web site creator so that the site creator may select the options/features desired for inclusion in the Web site. The tool has an application assembler module that combines the templates for the selected features/options with data input by the site creator to generate Web pages to thereby construct a complete Web site. The tool preferably comprises a software program for use on a computer network. The tool may be accessed through a suitable network interface. For example, a network browser may be used to access the tool. According to a preferred embodiment, the software tool runs on a Lotus Domino Server platform.

According to one embodiment of the invention, a site creator may construct a Web site in a manner represented in

## US 6,185,587 B1

7

FIG. 3. A site creator may start the process, for example, by directing a network browser to access a server, or other network node, on which the tool is loaded. The tool identifies the interface the site creator is using (step 4). Preferably, the tool automatically identifies the browser type being used and may present different views for different browser types. For example, the tool may present views that have certain common codes for all browsers and some browser-specific code based on the specific browser type identified.

At step 6 a site creator is presented with one or more views. The view(s) preferably presents a screen containing a menu of features and/or options for creating and customizing the Web site. For example, FIG. 4 depicts an example of one view presented to a site creator. As shown, a view may include certain command initiators (e.g., buttons to click on), explanatory text fields to explain the objective or function of various aspects of the view and one or more feature(s) or option(s) to be selected. As shown, the user may be prompted to select whether to create a new site or edit an existing one. Assuming the new site option is selected, the next view(s) may comprise features/options from which the site creator can select to customize the features/options appearing on the Web site. The features/options may pertain to those found on Web sites or other features/options. For example, the features/options may include a list of site areas, Web pages to include in a Web site, Web page formatting options, security links, colors, borders, buttons, workflow commands, graphics, backgrounds, text and other items. Some features or options may be required and some may be discretionary.

For example, FIG. 5 depicts the feature of Web site areas. As shown in FIG. 5, the site area options may include a list of predefined site areas such as Company Forms Area, Contact Management Area, Customer Tracking Area, Discussion Area, Document Library Area, Employee Phone Book Area, Frequently Asked Questions (FAQs) Area, Home Page Area, Job Postings Area, Products/Services Area, Project Management Area and Registration Area. Other areas may be created based on templates for these areas, without requiring the Web site creator to write or edit software code.

At step 8, a site creator may select the desired features/options. Selection may be accomplished in any suitable manner. For example, selection may be accomplished by using a graphic interface and selection device (e.g., by pointing a cursor at the selection and clicking on it), by entering text, or by other techniques. As shown in FIG. 5, desired site areas may be selected by entering an "X" in a check box. At step 10 it may be determined whether all selections have been made. If additional features/options are to be presented, the process returns to step 6 and repeats until all selections have been made and the process proceeds to step 12.

At step 12, the tool identifies which templates in a library of stored templates are associated with the features/options selected in step(s) 8. Upon identification of the associated templates, the tool may determine certain fields (required or desired) relevant to completing each template. At step 14, the site creator may be prompted for certain data to complete the template fields. For example, FIG. 6 shows an example of a view requesting data input from the site creator. The requested data may include fields such as company name, contact information, e-mail addresses and other information. Some fields may be required (e.g., marked by an \* and others may be optional). At step 16, the site creator may input the data for the requested fields and other data needed or desired

8

to include within the Web site. At step 18 a site creator may signal the tool to finish the creation of the Web site. Signaling may be accomplished in any suitable fashion. For example, a creator may use a graphic interface and selection device to select an object (e.g., a button) to signal the tool to finish.

At step 20 the tool may populate template profile fields with the collected data. The database templates may preferably be constructed using an application assembly engine, for example, AppAssembler (see, FIG. 30). The database preferably stores the various templates, profiles, forms and views. Initiating the tool to finish the Web site may cause input data to populate the profiles and fields. Some fields, preferably optional fields, contain default data. Upon population of the fields and profiles the Web pages may be constructed. As shown at step 22, the tool may create Web pages from the templates corresponding to the selected features and the input data. The created Web site may then be forwarded to server 30. Server 30 may comprise an approving module which may use a routing module to route the proposed Web site (or pages thereof) to predetermined users for review, edit, and approval. Approving module may include a notifying module which may notify certain predetermined users of various events. For example, certain users may be notified of a received request for approval, the amount time in which action must be taken, or other information. Routing module may send the Web site/pages to each of the predetermined users (which may be designated in a particular order) for completing the approval process. Once the approval process is complete, routing module may, at step 24, send the approved (and possibly revised) Web site/pages to server 30 for posting on a network.

By way of example, one embodiment of the invention may be implemented as follows. FIG. 3 shows a portion of a view (e.g., view 102) prompting a user to choose the option (e.g., option 104) for creating a new Web site or updating an existing site. The choice is made, for example, by using a computer mouse and clicking on one of the radio buttons adjacent the desired choice, although other methods may also be used. A text box on the view may be provided to explain each of the options available to the user. A similar dialog box may be provided on subsequent screens as well.

If the option to create a new site is selected, the user may be presented with another view, such as shown in FIG. 5. FIG. 5 shows the types of site area options which a user can choose to have included in a Web site. Some of these site areas may be designated as required areas. The user may select the desired options. Next, the user may be presented with a view presenting options for entry of information based on the selected site areas and/or other information. FIG. 6 shows the view displaying the options for input fields for basic information about a company or business. FIG. 7 shows a view presenting a user's options to designate certain individuals as authorized content composers, authorized readers (described below), and the number of steps involved in the content approval process. These settings may determine a portion of the security workflow and approval features for the site. Other features may be presented once the features are selected and data requested the user activates a "finish" button to cause the Web site to be created.

FIG. 8 illustrates another aspect of the web site development module. This design center feature provides a screen from which the user is prompted to decide on the options for the design of the web page, for example, by selecting colors, background images, frame styles, and logos. Once selections have been made, the user can preview the design and then

## US 6,185,587 B1

**9**

make changes as desired. The module essentially provides simple-to-use graphic design tools allowing a site creator to have a preferred layout and design, without writing or editing HTML or other code.

Once the site is created an authorized user (e.g., a web master) may make changes to the Web site using the tool. As shown in FIG. 9, an authorized user may be presented a view requesting the selection of the option to modify an individual area of the web site or to modify all of the site areas. This allows an authorized user the flexibility to change a specified page or area (e.g., changing a look to a product in the Products area) or to modify the entire site (e.g., incorporating a new company logo onto all of the relevant site pages). This feature is enabled by storing the "logo" field data as an object and linking to that object from each page that includes the logo. The linking is part of the template so that no code needs to be written by the Web site creator or content composer.

When modifying content, it may be preferable to use a pre-designed workflow process. For example, the content composer may create a proposed new Web page for inclusion in the site. Prior to posting the created Web page on a network (e.g., the Internet or an intranet), the proposed Web page may be contributed to, reviewed, edited, and approved by a number of other authorized users. A workflow module may be used to route the proposed content to other users. Once content has been approved for posting, the workflow module may post the content on the Web site via a network.

FIG. 1A is a schematic block diagram illustrating a web server in accordance with one embodiment of the invention. Web server 114 may comprise a HTTP server 130 in communication with an interface module 132, which in turn is in communication with a non-HTML server module 124. HTTP server 130 may comprise a mail application module 134 and a schedule and calendar application module 136. Interface module 132 may comprise a workflow module 138, security module 140 and command cache 142. Workflow module 138 is used to automate various tasks upon the occurrence of predetermined events. Security module 140 enables access control to non-HTML objects using role-based multi-level security. Command cache is used to store commands input by a user.

In operation, server 114 receives a URL-based request for a non-HTML object from a web browser via HTTP server module 130. HTTP server module 130 receives the request and extracts object information from the URL. HTTP server module 130 passes the information to interface module 132. Interface module 132 converts the URL-based request to a format supported by non-HTML server module 124 and communicates the request to non-HTML server module 124. Non-HTML server module 124 then locates and retrieves the object requested.

To facilitate modifying the site the content composer may be presented various views by the tool to add or modify pages. The view may be any type of graphical or text arrangement that provides a user with several options. For example, view may include a drop down or pop up menu, a list of options to be selected using a radio button selector, a text entry box, or other suitable graphical selection interface. Options present a user with various choices regarding the creation of a Web site and can be based on stored templates. For example, options may include choices regarding editing of text, colors, graphics or other objects, as well as, choices regarding positioning of objects, creation of new objects, deleting objects, adding links to other sites, security provisions, and other choices. For example, FIG. 10 depicts

**10**

a view that enables a content composer to add site images or to view/update site images. As illustrated the content composer selected the "add site images."

FIG. 11 shows selection of a source document from which object images may be added to a Web site. The content creator may be presented this type of view when adding images stored elsewhere on a network. FIG. 11 depicts various selections/inputs to be made. Based on a template for adding an image and the users input, images may be added without writing or editing code.

Some embodiments of the invention may include a preview function. A preview function may enable the user to view the Web page as it is created. For example as various options are selected, a preview of the option(s) selected may be displayed for a user to observe. This ability is provided by the tool based on the templates without requiring the user to close the file and reopen it with a browser as would be the case if the user were writing HTML code. Thus, the tool enables pages/objects to be rendered on-the-fly.

The Web site created using the above Web site creation/editing tool offers several advantages, both during creation, and after the Web site is posted. Some of these advantages are described below.

## Stored Pages

One advantage of the invention derives from the use of the stored templates. The templates may be stored in a database 40 associated with server 30. The templates may comprise a database storing profiles, fields, forms, views, text, formulas and other items. Use of templates preferably facilitates Web site design. For example, each object in Web site may contain an associated profile document. Updating the profile document allows a web master to automatically update each page of the Web site associated with the profile document. For example, a company logo may be stored in a template 35 as a profile document. The company Web site may display the logo on each Web page of the company Web site. A subsequent change in logo may be effected by merely updating the profile document, the tool may then automatically update each Web page with the new logo.

The templates enable a site creator to construct a customized and personalized Web page. The page(s) may comprise files suitable for use on a computer network. For example, the page(s) may comprise hypertext markup language (HTML) files. Options 104 may include features typically found on Web sites. Selection of option 104 may initiate the tool to select the appropriate templates associated with the selections. For example, a user may select an option to divide a page into one or more frames. Within each frame various objects may be displayed. For example, an object 50 may include text, graphics, logos, images, and other items typically found on a page. A page may also include various links to other files. For example, the link may include a uniform resource locator (URL) that may link to another Web page. A page may also include various fields in which text may be entered to customize the resulting Web page without writing HTML or other code. A user may select options that will cause the tool to construct such a page from one or more templates. Selection may be accomplished using an input device (e.g. input device 106).

## Automated Help

One embodiment of the invention provides for the automated generation of help pages to assist a user of a Web site, and more specifically, to enabling context-sensitive help. [For example, during site creation, a site creator may be presented with various views 102 containing options 104. Based upon the selected options 104 the tool may present the user with additional views 104 and prompts for data to

## US 6,185,587 B1

11

populate certain fields on stored templates.] The tool may assemble the data and selected options to create help pages associated with the selected options. For example, a creator may select an option to include a Frequently Asked Questions (FAQs) page in a Web site. The tool may then create, based upon stored templates and user input data, any help pages associated with the FAQs page and include them in the Web site.

One embodiment of the invention provides capability to modify existing help page templates. A developer may be presented a view 102 containing an option 104 to modify a stored template. Upon selection of such an option, the tool may then present the developer with additional views containing options, or requests for data input. The tool may then assemble the selected options and input data to create new or modified help templates. These new or modified templates may be stored in a storage device (e.g., database 40) become part of the tool and be accessible for subsequent use.

One embodiment of the invention includes the ability to provide context sensitive help to individuals using a Web site created by the tool. A library of help pages may have been stored and linked to the Web pages, for example during site creation. For example, areas of the site enabled with help pages may have markers indicating the existence of a help page for a particular field or other portion of a Web page. For example, a different color link or graphical marker may be used to indicate the availability of a help page. The site may be designed to recognize that the content creator's level of privilege to edit an existing Web site. Based upon the privilege level the content creator may be presented with context sensitive help pages. For example, if an authorized content creator desires help on editing a logo, certain markers regarding logo editing may be activated to allow the creator access to the help document associated with logo editing. Another situation for context sensitive help after site creation occurs for users with minimal or no privileges to contribute content to the site. These users may be presented with certain markers or help page indicators associated with stored help pages. These markers or indicators may be associated with certain areas of the site at a prior time, for example during site creation.

According to one embodiment of the invention, a software tool is provided for use with a computer system for simplifying the creation of a customized Web site by avoiding the need for the web site creator to know or use HTML or other programming language to create the web site. The tool comprises a plurality of pre-stored HTML templates. The templates preferably correspond to different types of Web pages and features (e.g., site areas) commonly found on Web sites. The tool further includes a library of Help documents associated with the templates. The help documents are preferably HTML documents created from one or more of the templates. The help documents include fields that link the document with one or more related fields of other templates to associate each help document with one or more features and/or fields. In this way, context-sensitive help can be provided. For example, particular web pages or portions of a web page (e.g., a field) may have specific help documents associated therewith. The areas of the web site having associated help pages may be graphically marked (e.g., an icon with a ? or by colored highlighting) to indicate the existence of a help page for the particular field or other portion of a Web page. In other cases, a help icon may appear generally on the page to indicate help available for the page.

The help documents created by the tool (preferably from one or more templates) can provide help information about

12

using the site creator tool, using a web site created by the tool or using the tool to modify a web site created by the tool.

An example of this type of automated generation of a help page would be a page on a web site designed to enable users to purchase a particular product. The tool may create a help page to assist with purchasing the product on the web site. A specific field (e.g. method of payment) may have specific information about that topic.

One embodiment of the invention enables a developer to use the tool to add to or modify existing help page templates. These new or modified templates may be stored in a storage device (e.g., database 40) become part of the tool and be accessible for subsequent use.

Detailed below are examples of how certain features of the invention are implemented according to preferred embodiments. However, the invention is not limited to these specific implementations.

FIG. 12 shows a page from the built-in site creator guide, which can be accessed, for example, by clicking a button on the view. The contents of the guide are divided into sections and subsections, each of which can be expanded or collapsed to show more detail. FIG. 13 shows a page from an overview section. As shown in FIG. 14, the guide has three main sections corresponding to different functional classes of users—site designers, site administrators, and site contributors.

FIGS. 15 through 17 show other possible source documents useable with the tool. A user can add or modify documents to customize menus and settings in the module. FIGS. 18 and 19 illustrate examples of documents used to enable other features and configurations of the module, including border buttons, workflow commands, and graphics menus. These source documents can be edited by the user. Documents may be added or deleted as desired. This is done without requiring the need to write or modify software code by the user.

The invention enables a user to choose preferred customizable modules from modules that include Corporate Policies and Procedures, Feedback, Discussion, Products and Services, Frequently Asked Questions, Job/Career Opportunities databases and more.

The invention provides architectural framework and software modules for building and managing a plurality of networks and modules, for example, extensible intranets and business modules. According to a preferred embodiment, the invention enables a user to leverage the content, collaboration, and commerce capabilities of the Lotus Domino™ server. However, other servers with the requisite functionality may be used. For example, Domino.Action™, (Domino.Merchant Sever Pack) included with Domino™, contains the site creation tool and eleven or fifteen (or any predetermined number of) template-based software modules that allow a Webmaster to create functionality in the site.

For example, the modules may include a Home Page and an About the Company page, Corporate Policies and Procedures, Discussion, Document Library and White Papers, Feedback, Frequently Asked Questions, Job/Career Opportunities, Products/Services, and Registration. One or more of these site areas may be used internally (e.g., on an intranet) and, if desired, extended to an external network (e.g., the Internet) for use by customers, business partners, and others. All employ the capabilities for interactive communication, structured collaboration, and workflow coordination. This enables threaded discussions, allows users to complete questionnaires and surveys, participate in two-way information processes, and route information quickly and easily to the people that need it.

## US 6,185,587 B1

13

Preferably, the tool includes a Library. The Library is a template library of design elements like, fields, forms, database views, etc., used to build the web site requested.

If a Web site needs an area that's not already provided, an authorized user can create a new custom area as follows.

First, the user creates a shell for the new area. To create the shell of the new area the following steps are performed:

1. In SiteCreator, copy, rename, and modify the Area Spec and Workflow Spec documents for an existing area;
2. Add the new area name to the Area Spec for every area that should internavigate with the new area;
3. Copy and modify the Area Profile and Workflow Profile documents that correspond to the new Spec documents;
4. Add the new area name to the Site Spec and FileUpload Spec documents;
5. Refresh the affected Spec, Profile, and File Upload documents; and
6. Upload the navigation graphics for the new area into the Library.

Next the authorized user creates the new pages. This may be done by performing the following steps:

1. In the Library, copy and edit the Page Template for an existing area to use as the foundation for the new pages;
2. In SiteCreator, copy and modify the Form Spec documents for the chosen pages;
3. Copy, modify, and refresh the Form Profile documents that correspond to the Form Spec documents copied in the previous step; and
4. In the Library, copy and edit the Input and Display subforms associated with the new pages, as necessary.

The following is an example of the process for copying and modifying the existing Document Library area to create a new Contracts area designed specifically for contracts and other legal documents.

An authorized user first identifies the existing area that comes closest to the functionality wanted in the new area and decides what types of content pages the new area should have. Then, the authorized user identifies the new area's Banner and Navigation graphics, in Basic, Contemporary, and/or Corporate styles (see FIG. 20). Next, the authorized user creates the new Area Spec and Workflow Spec documents. The Spec documents tell SiteCreator about the contents of the Library, which serves as the object store. To begin this step, the authorized user selects the SiteCreator icon on the Notes workspace, and opens the view called System Views\All.

Then, the AreaSpec document for the prototype area (e.g., DocLibrary) is located. A copy is made and the fields are modified as necessary. Preferably, the DocumentUniqueID field is not customized because it contains the document's unique ID.

The Internal Name field contains the area's alias, or synonym, which is used in all references in forms and views. This allows an authorized user to change the area's user-visible External Name without affecting the operation of SiteCreator or the Website. An authorized user can enter the new area name, Contracts, in the Internal Name field.

The Multiple Object Lookup Name field and the Internal Name field, in most cases, contain the same value. Occasionally, however, a user may need another way to look up the object. In this case, enter Contracts (the same value as Internal Name) in the Multiple Object Lookup Name field (see FIG. 21).

An area's External Name is the user-visible name that appears in the Site Configuration profile. During the Site

14

Design step, the external name appears in the Control pane and at the top of the each Site Design document. In this example, the user would enter Contracts Area in the External Name field.

5 The Description field describes the features and uses of the new area. The description is looked up in the System\View Description form. Users can see the description during the Site Configuration step when they click the button to view area descriptions.

10 The ConfigFields Lookup field enhances lookup performance by calculating a text list of all the elements in this section. These fields communicate to the AppAssembler what objects it needs from the Library and, in some cases, how to act on the objects.

15 The Views field contains the name(s) of view(s) that are specific to this area. The Views list need not be modified unless the user creates a special view for the new area.

20 The Name Change Style option controls the link text and titles for the various view pages. "KeywordLabel" refers to the label entered as a Content Indexing category. Contracts,

for example, may be indexed by Contract Type and Expiration Date. If a Label field in the Content Indexing section contains Contract Type, the Name Change Style options produce the following link text and titles: Name Change StyleLink Text\View TitleExternalName by KeywordLabel-Contracts Area by Contract Type"By" KeywordLabelBy Contract TypeExternal NameContracts AreaKeywordLabel-Contract Type"List by" KeywordLabelList by Contract TypeNo ChangeSelect this option for views that are hidden from users.

30 The Agents field contains the names of agents that are specific to this area. Unless a user creates an agent that is specific to the new area, there is no need to add to or delete from this list.

35 The Forms field contains the names of the standard system forms for this area. The user does not need to add to or delete from this list.

The DocumentCopyView contains the document(s) that are copied to every area. The user does not need to add to or delete from this list.

40 The AccomElements Lookup field is a computed field that enhances lookup performance by calculating a text list of all the elements in this section.

45 There are several Area Fields. The Primary Area Internal Name field, is used to enter the internal name of the area (e.g., Contracts). The Primary Area External Name is a computed field that looks up the area's external name in the view called Lookup\Specs by Internal Name (see FIG. 22).

In the Area Spec document, the Area(s) belong field should contain the internal name of every site area that should recognize and internavigate with the new area. The user may add the internal name of the new area to the list of area names. The user should also add the new area to the Area Spec document for each listed area.

55 The AreaFields Lookup is a computed field that enhances lookup performance by calculating a text list of all the elements in this section.

To handle The Workflow Spec document, in the System Views\All view, find the WorkflowSpec document for the prototype area (DocLibrary), make a copy of it, then modify the fields as necessary.

60 To handle the Configuration Fields, the user replaces the existing area name (Document Library) with the new area name (Contracts) in the Internal Name, Multiple Object Lookup Name, External Name, and Description fields.

65 Unless the user wants to change the default Name Change Style option, there is no need to modify the fields. Views,

US 6,185,587 B1

**15**

Agents, Forms, and Document View are specified in the Area Spec document.

For the Area Fields, the user replaces the existing area name (Document Library) with the new area name (Contracts) in the Primary Area Internal Name and Area(s) Belong fields.

For the Type field, the Workflow subform should be specified.

For the DesignHideRequesterAction, the user should Select No if the Process/Hold radio buttons are to be displayed on the Input forms for this area. The user Selects Yes to hide the Process/Hold buttons on the Input form for areas where document authors cannot edit their documents.

The DesignShowAdvancedACL fields include the options to Allow Anonymous and Allow Anyone to Author. These options permit authoring while preventing editing in, for example, a Discussion, Feedback, or Registration area. This relates to the "Workflow and Security" features.

The AreaFields Lookup field is a computed field that enhances lookup performance by calculating a text list of all the elements in this section.

Next, the user adds the new area to all AreaSpec documents. For an existing site area to recognize and internavigate with the new one, its AreaSpec document must contain the name of the new area. The AreaSpec document for each existing area is opened, the Area Fields section is expanded, and the internal name of the new area is added to the list in the Area(s) Belong field.

The user can now Create new Area and Workflow Profile documents. The Profiles take their defaults from the corresponding Specs and become the Site Design documents that users interact with during the site-creation process.

In the System Views\All view, find the AreaProfile and WorkflowProfile documents, and copy the documents that correspond to the AreaSpec and WorkflowSpec documents copied in the previous step. In both documents, specify the appropriate internal name in the Internal Name field. In the AreaProfile document, the user enters the default Link Text (in this case, Contracts) and a default Area Database File Name (Contract.nsf).

Next, the user Updates the SiteSpec and FileUploadSpec documents. To install the new area as an option on the Site Configuration profile, open the existing SiteSetup document in the SiteSpec section (still in the System Views\All view). Add the new area name to the Area(s) Belong field in the Area Fields section.

The user can make sure the new graphics are recognized by all the areas by opening the SiteImage document in the FileUploadSpec section and adding the new area name to the Area(s) Belong field in the Area Fields section. The user can Refresh the affected documents to make sure that all the new elements are properly created by AppAssembler and recognized by the other site areas. To refresh the affected documents:

1. In the System Views\All view, the user selects the following documents:

- all of the documents in the AreaSpec section
- all of the documents in the AreaProfile section
- the document for the new area in the WorkflowProfile section
- the SiteSetup document in the SiteProfile section
- the SiteImage document in the FileUploadSpec section
- all of the SiteImage documents in the FileUpload section

2. Make the documents refreshable by running the System\Set ProfileUpdate to Y agent from the Actions menu.

3. Refresh the documents by running the System\Refresh Selected Docs agent.

**16**

To Install the new area's graphics, the user can perform this step from the web, using a browser that supports file upload (such as Netscape). The user starts the browser and goes to the Library database on the Domino server (FIG. 23), then performs the following steps:

1. From the list of Views, click Contributor's Menu, then click Contributor's Menu again on the resulting page;
2. Click Upload a file to open a FileUpload form in edit mode;
3. To keep the new image together with the rest of the system navigation and banner graphics, select Domino.Action Internal as the File Category;
4. Enter a brief description, then enter the name of the file desired to be attached. Do not enter the file path. If the Browse button is used to find the file on a hard drive or network, be sure to delete the path information that precedes the file name;
5. Click the Submit button to save the page; and
6. To upload another graphics file, click the Go to Contributor's menu link on the "You have successfully submitted this page" message, and repeat steps 2 through 5.

At this point, the shell of new area is created. The final step is to create the area's main page and content page(s) using the Creating New Page Types for an Area.

In SiteCreator, each page type (template) is defined by a Form Spec document and a corresponding Form Profile document. The Spec document tells AppAssembler which elements are needed from the Library (the object store). The Profile takes its defaults from the corresponding Spec. For purposes of creating a new page (template) the key Library elements are the Display subform and the Input subform. The Input subform establishes the layout and user interface for the forms that site visitors and contributors fill out; the Display subform controls the appearance of the Web page (pages may also contain System, Workflow, ActionLinks, Categorization, and other subforms).

An efficient way to create a new page type is to identify the existing page that comes closest to a desired web page, and then copy and modify the forms and subforms that define it.

Before beginning, the user should make sure that he/she is assigned to the [NetPresConfig] role in SiteCreator. Then, identify the existing content page(s) that comes closest to a user's preference. The following steps may be performed:

1. In the Library, copy and edit the Page Template for an existing area to use as the foundation for the new pages;
2. Copy and edit Input and Display subforms, as necessary;
3. In SiteCreator, copy and modify the FormSpec documents for the chosen pages; and
4. Copy, modify, and refresh the Form Profile documents that correspond to the new FormSpec documents.

An example of the process, including copying and modifying the existing main page and content page from the Document Library area for use in a new Contracts area designed specifically for contracts and other legal documents will be given.

First, Copy and edit a Page Template. This can be done as follows:

1. On the Notes workspace, select the Library icon and choose View-Design-Forms;
2. Make a copy of the Page Template for the prototype area—in this case, Doc Library Page Template;
3. Select the new copy, then choose Design-Properties and change the form name to Contracts Page Template;

## US 6,185,587 B1

17

4. Change the title of the form to Contracts Page Template Form; and
5. Edit the FormInternalName field, entering “ContractsPage” as the default value (see FIG. 21).

Next, the user should Copy and modify Display and Input subforms. To change the appearance of a new page, copy and modify the Display subform(s) used by the page. Similarly, to make changes to a page’s Input form, copy and modify the Input subform used by the copied page type.

A description of “Display and Input Subforms” explains how to determine the Display or Input subform associated with a particular page type. Alternatively, the relevant Display subform(s) may be listed in the Display Subform Choices field on the page’s FormSpec document in SiteCreator. The Input subform appears in the Input Subform field on the FormSpec document.

In our example, the ContractsHomePage is based on the DocLibraryHomePage, and the ContractsPage is based on the DocLibraryPage. Both pages use the following Display subforms (depending on which Page Look option is selected during the Site Design process):

```
DisplayBottomBulletText1
DisplayBottomGraphic1
DisplayBottomText1DisplaySideBulletText1
DisplaySideGraphic1
DisplaySideText1DisplayTopBulletText1
DisplayTopGraphic1
DisplayTopText1
```

The ContractsHomePage uses the Input3 subform; the ContractsPage uses the Input1 subform.

Next, the user can Copy and modify the FormSpec documents. To begin this step, select the SiteCreator icon on the Notes workspace and open the view called System Views>All. Find and copy the FormSpec documents for the prototype page(s), then modify the fields as necessary. If creating pages for a new area, the user should create a main page as well as the content page(s).

Next, the user can replace the existing area name (DocLibrary or Document Library) with the new area name (Contracts) in the Internal Name, External Name, and Description fields. Preferably, the user should not modify the Multiple Object Lookup Name field. In most cases, the Multiple Object Lookup Name field and the Internal Name field contain the same value, but not for an area’s Main Page. All main page objects belong to a superset object class called “AreaHomePage.” This class name allows AppAssembler to look up the AreaHomePage template for the main page of all areas while using the Internal Name to group the finished form with the proper area—Contracts, in this case (FIG. 24).

Unless a user desires to change the default Name Change Style option, these fields do not need to be altered. Views, Agents, Forms, and Document View are specified in the Area Spec document and generally do not need to be listed in the Form Spec document.

The Name Change Style option controls the link text and titles for the various view pages. “KeywordLabel” refers to the label entered as a Content Indexing category. In our illustration, for example, Contracts is indexed by Contract Type and Expiration Date. If the Content Indexing label (the KeywordLabel) is Contract Type, the Name Change Style options produce the following link text and titles: Name Change StyleLink Text/View TitleExternalName by KeywordLabelContracts Area by Contract Type“By” KeywordLabelBy Contract TypeExternal NameContracts AreaKeywordLabelContract Type“List by” KeywordLabelList by Contract TypeNo ChangeSelect this option for views that are hidden from users.

18

## Area Fields

Replace the existing area name (Document Library) with the new area name (Contracts) in the Primary Area Internal Name and Area(s) Belong fields.

## 5 Specific Fields

**Keywords Allowed:** This field specifies whether a page contains a Content Indexing subform. An area’s Main Page does not, so accept the default of No. Select Yes to use the subform.

10 **System Subform:** This field contains the internal name of the System subform for this object. The invention preferably contains one System subform, so accept the default of System.

15 **ActionLinks Subform:** The ActionLinks subform (preferably, there is only one) contains the Graphical navigation links that enable Composers and Approvers to access the Contributor’s Menu.

20 **Input Subform:** The Input subform controls the layout and operation of the forms filled out by site visitors and contributors. If a user creates a new Input subform for this page type, specify its internal name here; otherwise, accept the default Input subform.

25 **Display Subform Choices:** This field contains a list of Display subforms that work with this page type. These display choices appear in the Page Layout dialog on the Site Design document. If a new Display subform is created for this page type, add its internal name to the list.

30 **Workflow Subform:** This field contains the internal name of the Workflow subform for this object. The invention contains only one Workflow subform, so accept the default of Workflow.

35 **Form Template:** All main pages are based on the form template called AreaHomePageTemplate, so the value of this form is preferably not changed by the users of this system. Alternatively, the user may specify the internal name of the Page Template copied and renamed in the first step—in our example, ContractsPageTemplate.

40 **Document Type:** Accept the default of Parent. The Child option is appropriate for subordinate page types only; not for a main page.

For FormSpecificFields Lookup: This computed field enhances lookup performance by calculating a text list of all the elements in this section.

## Configuration Fields

45 **Content Page—Configuration Fields:** replace the existing area name (Document Library) with the new area name (Contracts) in the Internal Name, Multiple Object Lookup Name, External Name, and Description fields.

## Page type

50 (internal name)
   
Content Indexing
   
Categorization subform
   
AboutPage
   
CorpPolicyProcedurePage

DocLibraryPage

HomePage

JobPostingDoc

ProdInfo

WhitePaperPage

60 CategorizationQuestions

DiscussionPage

DiscussionCategorizationQuestions

FAQsPage

FAQsCategorizationQuestions

FeedbackPage

FeedbackCustomQuestions

RegistrationPage

## US 6,185,587 B1

19

## RegistrationCustomQuestions

To create new Form Profile documents, in the System Views\All view, find and copy the FormProfile documents that correspond to the FormSpec documents. In each document, specify the appropriate internal name in the Internal Name field.

## Refresh The Profile Documents

To update the new Profile documents' lookup fields with the values from the new Spec documents, it is recommended that the documents be refreshed. One method of refreshing the documents is as follows:

1. Select the new Profile documents in the view pane;
2. Make the documents refreshable by running the agent called System\Set ProfileUpdate to Y; and
3. Refresh the documents by running the System\Refresh Selected Docs agent.

Another aspect of the invention is the ability to easily create, edit, and approve content. The following steps can be performed according to a preferred embodiment of the invention to keep a site's content current:

A Web site according to the invention may comprise one or more information areas, each of which contains related content. For example, a Products/Services area might contain product descriptions, product reviews, and spec sheets. A Corporate Policies and Procedures area might contain policy guides, employee manuals, and benefits information. A site may comprise several of the following areas: Home Page, About the Company, Corporate Policies and Procedures, Discussion, Document Library, Feedback, Frequently Asked Questions, Job Postings, Products and Services, Registration, White Paper(s), Roles, and other areas. To maintain site security, the invention allows the site manager or Webmaster to assign roles that define users' privileges. The following roles, which are assigned in the Security/Approval profile for each area, control who is allowed to add and edit new pages, who must approve new pages before they are posted, and who can read pages. Composers are users that create/edit new content. Approvers are users that can participate in the approval process. Readers are users that can read pages but not create or edit content. Exceptions: In Discussion area, Readers can create and read pages, but cannot edit them. In Registration and Feedback areas, Readers can create pages but cannot read or edit them.

Roles are assigned separately for each area so a user may not have the same access to every area. For example, a Composer for the Products/Services area may not be able to compose new pages for the Job Postings area.

In the Security/Approval profile for each area, the site manager or area manager can specify a predetermined (e.g., five) approval steps and can assign a different approver (or set of approvers) for each step.

With respect to creating content pages, a user assigned to the Composers role for a particular area, can, among other things, add or edit content on the area's main page (the first page to appear after the link to that area is clicked) or create or edit new content pages in the area.

To do so, the user starts the Web browser and goes to the desired area of the site. For example, a Composer for the Document Library area would go to the site's Home page and follow the Document Library link.

To add content to an area's main page, the user performs the following steps:

1. Click the Edit/Approve This Page link. If a user is not assigned to the Composers or Approvers role, that user will not see this link;
2. Select a logo or banner for the page from the drop-down list; and
3. Enter a title, subtitle, and other content to the page. When finished, select Process, then click Submit.

20

If the Security/Approval profile for the area specifies zero approval steps, then the new document becomes public immediately. If the Security/Approval profile specifies one or more approval steps, the page must be approved by someone who is named as an Approver for each approval step. While a document is awaiting approval, Composers cannot access it.

To create a new content page, the following steps may be performed:

10. 1. Go to the area's main page and click the To Contributor's Menu link. If the user is not assigned to the Composers or Approvers role, that user will not see this link;
2. Click the link to Compose one of the available page types; and

15 After completing the page, select Process, then click Submit.

Note: If the Security/Approval profile for the area specifies one or more approval steps, the page must be approved by someone who is named as an Approver for each approval step.

20 While a document is awaiting approval, Composers cannot access it, although the system may be configured to allow access.

25 The invention also enables Indexing of content pages. Most content pages provide one or more fields designed to help index the new information. If a page under construction contains such fields, a category should be selected (or a new category entered, if that is an option) from at least one drop-down list. Some content pages allow categories to be entered in case the page falls into a category that isn't listed (see FIG. 25).

30 Pages are indexed by category, so categorizing a page properly ensures that it appears in every relevant index. This, in turn, helps readers find information more quickly. For example, in a Document Library that contains many types of documents, it may be easier to locate a specific document in a list organized by document type than in a list organized by title.

35 The invention also facilitates editing content pages. If a user is assigned to the Composers role for a particular area, that user can edit not only the area's main page but also any approved page in the area. To edit a page, the user starts the Web browser and goes to the page to be edited. Then, the following steps may be performed.

40. 1. Click the Edit/Approve This Page link. (If the user is not assigned to the Composers or Approvers role, that user will not see this link.)
2. After the desired changes have been made, select Yes to Republish the Page, then click Submit.

45 According to another aspect of the invention, when a user edits and republishes a page, the page may become public immediately. It is not necessary to repeat the approval process even if the Security/Approval profile for the area specifies one or more approval steps, although it may be repeated if desired.

50 The invention also includes features to facilitate approving content pages. According to one embodiment, an Approver for a particular area, must approve each new page that is submitted for that area before it can be posted publicly. The area's Security/Approval profile may specify more than one approval step, and/or it may specify more than one person for each approval step. Preferably, only one person approves a page, even if several people are designated in the same approval step. After one designated approver approves the page, the page is either published or—if the Security/Approval profile specifies more than one

US 6,185,587 B1

**21**

approval step—passed along to the next approval step. This can be done automatically via electronic routing. If the Security/Approval profile specifies Automatic Notification, all approvers for the current approval step receive an e-mail message alerting them of a page requiring approval. The message contains a link to the page requiring approval. If the message is not automatically routed, the page to approve can be viewed by clicking the To Contributor's Menu link on the area's main page. From there, the link to one of the Approval Process views may be clicked. The approval process may include the following steps.

1. Open the page desired to be approved and click Edit/Approve This Page. (If the user is not assigned to the Composers or Approvers role, that user will not see this link.)
2. After reviewing and/or editing the content, scroll down the page to the Approval Section. Select an Approver Action, then click Submit.

Another aspect of the invention is the use of Input and Display Subforms. A Domino.Action page is composed of multiple subforms, including System, Workflow, Action-Links Display, and Input subforms. For the purposes of customizing pages, the key subforms are Input and Display. The Input subform establishes the layout and user interface for the forms that site visitors and contributors fill out; the Display subform controls the appearance of a Web page.

On the final form that AppAssembler builds and places into the site database, the Input subform appears before the Display subform and determines the content (title, subtitle, and text) of the completed page.

The Input and Display subforms reside in the Library. To copy an Input or Display subform, select the Library icon on the Notes workspace, choose View—Design, and click Subforms.

There are at least two ways to determine which Input subform to copy, but a user should know the page type of the page that comes closest to what is preferred.

If a user believes a page may have been modified to use a different Input subform, check the Input form specified in SiteCreator. In the System Views\All view, open the Form-Spec document for the page type desired. The Input Subform field in the Specific Fields section contains the name of the Input subform currently used for that page type.

If the page type is known, a user can quickly determine which Display subform(s) a page uses by looking in SiteCreator. Using the SiteCreator method, in SiteCreator, go to the System Views\All view, and open the FormSpec document for the page type desired. In the Specific Fields section, the Display Subform Choices field lists all of the Display subforms that work with the page type and appear as options in the Page Layout dialog on the Site Design document. In the Library method (which enables the user to skip SiteCreator and go directly to the Library to both identify and copy the subform(s) a user wishes to modify), the number at the end of each subform title identifies the page type, as outlined in the following table:

Number	Page Type	Main page for all areas
1	Type1	Spec Sheet
2	Spec	Product Review
3	Product	Information Page with Product graphic
4	Discussion	Main Topic or Discussion Response
5	Feedback	FAQs

The subform title describes the layout. In the example of FIG. 26, "layout" refers to the location (side, bottom, or top) and type (text, bulleted text, or graphic) of the navigation links.

These characteristics appear in the Page Look option in the Site Design document for the page. For example, the DisplaySideBulletText1 subform is used for an area's main page when the selected layout (Page Look) is Corporate (or Basic or Contemporary) display w/side navigation and bulleted text links as shown in FIG. 27. FIG. 28 is a block

**22**

diagram of an overall system using an AppAssembler. The system may include a site creator and a library in communication with the AppAssembler. The AppAssembler may be in communication with a site.

Other embodiments and uses of the invention will be apparent to those skilled in the art from consideration of the specification and practice of the invention disclosed herein. The specification and examples should be considered exemplary only. The intended scope of the invention is only limited by the claims appended hereto.

Other embodiments and uses of the invention will be apparent to those skilled in the art from consideration of the specification and practice of the invention disclosed herein. The specification and examples should be considered exemplary only. The scope of the invention is only limited by the claims appended hereto.

**15** What is claimed is:

1. A computer system comprising a tool for creating a Web site having user specified features and help documents associated with the specified features, said tool comprising:

means for storing a library of templates corresponding to predefined features available in a web site;

means for storing a plurality of help documents, each relating to one or more of the available features;

means for enabling a site creator using the tool to select the desired features for a Web site; and

means for building a Web site based on the templates corresponding to the selected features, where the tool copies the Web site help documents relating to the selected features to the Web site and wherein the tool creates the web site help documents without requiring the site creator to create the web site help documents.

2. The computer system according to claim 1, wherein each feature comprises one or more options and said stored help documents further comprise help documents relating to one or more options.

3. The computer system according to claim 1, wherein said library of templates comprises a template for creating a help document.

4. The computer system according to claim 1, wherein said plurality of help documents comprises one or more types of help documents including:

help documents to enable a site creator using the tool to access help while creating a site;

help documents that relate to features of a web site created by the tool to enable users accessing the created site to access help for those features; and help documents that enable an authorized user to access help when modifying an existing site.

5. The computer system according to claim 1, wherein said help documents are stored as HTML files.

6. The computer system according to claim 1, wherein said help documents are HTML files and the templates comprise one or more HTML files including links to one or more help documents to enable context-sensitive help.

7. The computer system according to claim 6, wherein said one or more links comprises a link from a portion of a Web page to a help document to enable context-sensitive help for that portion of the Web page.

8. The computer system according to claim 6, where said one or more links comprises a link from a Web page to a help document to enable context-sensitive help for the Web page.

9. The computer system according to claim 1, further comprising means for using the tool to create new help documents.

10. The computer system according to claim 9, wherein the new help documents are created based on one or more of said stored templates.

11. The computer system according to claim 9, wherein said new help documents are created without requiring new HTML code to be written by a web site creator.

US 6,185,587 B1

**23**

12. A computer system comprising a tool for creating a Web site said tool, comprising:  
 a library of stored templates corresponding to a plurality of features available in a Web site;  
 a library of stored help documents, each document corresponding to one or more features;  
 an input device by which a user can select from among the plurality of features; and  
 an application assembler that creates a Web site based on the templates corresponding to the selected features and that selectively includes the corresponding help documents, wherein the application assembler creates the help documents without requiring the user to create the web site help documents.

13. The computer system according to claim 12, wherein each feature comprises one or more options and the help documents further comprise help documents relating to the one or more options.

14. The computer system according to claim 12, wherein the library of stored templates comprises a template for creating a help document.

15. The computer system according to claim 12, wherein the help documents comprises one or more types of help documents comprising:

help documents to enable a site creator using the tool to access help while creating a site;  
 help documents that relate to features of a web site created by the tool to enable users accessing the created site to access help for those features; and

help documents that enable an authorized user to access help when modifying an existing site.

16. A method for using a tool for creating a Web site having user specified features and help documents associated with the specified features, said method comprising the steps of:

storing a library of templates corresponding to predefined features available in a web site;

storing a plurality of help documents, each relating to one or more of the available features;

enabling a site creator using the tool to select the desired features for a Web site; and

building a Web site based on the templates corresponding to the selected features, where the tool copies the Web site help documents relating to the selected features to the Web site, wherein the tool creates the web site help documents without requiring the site creator to create the web site help documents.

17. The method according to claim 16, further comprising the step of creating one or more help documents.

18. The method according to claim 16, further comprising the step of accessing help while creating the site.

19. The method according to claim 16, further comprising the step of enabling context-sensitive help for the web site.

20. A computer usable medium having computer readable program code means embodied therein for creating a Web site having user specified features and help documents associated with the specified features, said computer usable medium comprising:

computer readable program code means for storing a library of templates corresponding to predefined features available in a web site;

computer readable program code means for storing a plurality of help documents, each relating to one or more of the available features;

computer readable program code means for enabling a site creator using the tool to select the desired features for a Web site; and

**24**

computer readable program code means for building a Web site based on the templates corresponding to the selected features, where the tool copies the Web site help documents relating to the selected features to the Web site, wherein the tool creates the web site help documents without requiring the site creator to create the web site help documents.

21. The medium according to claim 20, wherein each feature comprises one or more options and the help documents further comprise help documents relating to the one or more options.

22. The medium according to claim 20, wherein the library of templates comprises a template for creating a help document.

23. The medium according to claim 20, wherein the plurality of help documents comprises one or more types of help documents comprising:

help documents to enable a site creator using the tool to access help while creating a site;

help documents that relate to features of a web site created by the tool to enable users accessing the created site to access help for those features; and

help documents that enable an authorized user to access help when modifying an existing site.

24. The medium according to claim 20, further comprising creating means for using the tool to create new help documents.

25. A computer usable medium having computer readable program code means embodied therein for creating a Web site having user specified features and help documents associated with the specified features, said computer usable medium comprising:

storing means comprising a library of templates corresponding to predefined features available in a web site;

storing means comprising a plurality of help documents, each relating to one or more of the available features;

enabling means enabling a site creator using the tool to select the desired features for a Web site; and

building means building a Web site based on the templates corresponding to the selected features, where the tool copies the Web site help documents relating to the selected features to the Web site, wherein the tool creates the web site help documents without requiring the site creator to create the web site help documents.

26. The medium according to claim 25, wherein each feature comprises one or more options and the help documents further comprise help documents relating to the one or more options.

27. The medium according to claim 25, wherein the library of templates comprises a template for creating a help document.

28. The medium according to claim 25, wherein the plurality of help documents comprises one or more types of help documents comprising:

help documents to enable a site creator using the tool to access help while creating a site;

help documents that relate to features of a web site created by the tool to enable users accessing the created site to access help for those features; and

help documents that enable an authorized user to access help when modifying an existing site.

29. The medium according to claim 25, further comprising creating means for using the tool to create new help documents.

\* \* \* \* \*